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EnterpriseTrack

Application Administration Guide
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Contents

Administration Overview

The Administration module in EnterpriseTrack allows you to manage your deployment by changing various aspects of the application. Access to the administration and configuration UI is controlled through permissions. The Administration link is displayed only if you have permissions to access at least one administration section. You can use following tabs on the Administration module to set and manage EnterpriseTrack:

- ▸ **Application Configuration**: From this tab you can access links to configure the following: projects, project settings, organizational hierarchy, status reports, calendars, routing, custom fields, classification fields, resource pulldown, alignment pulldown, global pulldown, and initiative pulldown.
- ▸ **Resource & Security Admin**: From this tab you can access links to resource administration, resource configuration, resource admin reports, timesheet settings, security administration, and configuring temporary administrators.
- ▸ **Finance**: From this tab you access all finance management links.
- ▸ **General Settings:** From this tab you can access links to configure you company settings, help settings, notifications/emails, storyboard, mobile, and report, listing page, and search settings.
- ▸ **Data Import & Export:** From this tab you can access links to data import, data export, and download integration templates
- ▸ **Background Jobs:** From this tab you can view the submission status of all rate change requests.
- ▸ **Updates:** From this tab you can view the updates that were made to the system. You can view a list of release upgrades, hot patches, and service packs that were applied. It also displays the mode changes, customizations, and the new initiatives that were added. This is a ready-only tab.

Getting Around in the Administration Module

Access

To Access the Administration module, click on the **Administration** link in the Left navigation bar or select **Go To > Administration** from the Top Navigation Bar to access the Administration User Interface (UI).

Navigation

Using the Top Navigation Bar
The Top Navigation bar is active when you log into the system. It contains the Application Level menu and depending on the context, a Module Level menu.

- ▸ The **Home** button takes you to your default home page. When the Left Navigation bar is hidden, it is displayed on the blue banner. When the Left Navigation bar is displayed, the **Home** button is displayed on the Left Navigation bar.

▶ The **Go To** menu provides access to all major modules within the EnterpriseTrack system. The items displayed in this menu depend on the features enabled for your deployment and your permissions.

▶ The **Create** menu displays menu options to create a new project, proposal, idea, program, resource or message, etc.

▶ The **My EnterpriseTrack** (terminology is configurable) menu displays options that take you to your specific actions and settings. It shows your work (all open actions on Projects, Proposals, Ideas etc. that are assigned to you), your messages, certifications, permission, profile, preferences and passwords.

▶ The **View** menu allows you to display toolbars at the Top banner, and Left Navigation bar. You can also save your settings.

▶ The project type ahead text box provides easy navigation to any project in the system. In the text box **Type Project ID or name**, you can type the Project ID or any part of the name and as you type, the system gives you project choices that match the ID or name you are typing.

▶ The **Advanced Search** menu gives you different ways for searching the system. You can search on projects, proposals, documents, etc.

▶ From the **Help** menu, you can launch the online help in a new window, or launch UPK.

▶ Click on the **Logout** button at any time to log out.

Using the Left Navigation Bar

To display the Left Navigation bar, from the Top Navigation Bar select the **View** menu and choose **Display Left Navigation**. Select if you want to display icons only or icons and text. The Left Navigation bar provides access to all modules in the EnterpriseTrack system. The list of menu items displayed depends on the features enabled for your deployment and your permissions. As you drag the mouse over these items, you will see the clickable items change color. Current selections are always highlighted. Clicking on any of these options typically takes you to a listing page with summary information.

Use the ☰ icon on top of the Left Navigation bar to expand and collapse the Left Navigation bar. To return to the main **Administration** menu from any of the above sections, click the **Administration** link in the Left Navigation bar.

> **Important!**
>
> Do not use the browser's **Back** and **Forward** buttons to navigate to a different page. Use the left navigation bar and/or the buttons provided within Enterprise Track. When you first log into the system, the left and top navigation bars will be active. Once you enter a specific page within a module, you will find that all the navigation buttons are disabled.

Sorting

There are several pages within the Administration module where lists of items are displayed. The lists within EnterpriseTrack can be sorted by clicking the column title.

Privacy Configuration

In This Section

About Personally Identifiable Information

Personally identifiable information (PII) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example a person's IP address, phone IMEI number, gender, and location at a particular time could all be personally identifiable information. Depending on local data protection laws, organizations might be responsible for ensuring the privacy of PII wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

About Consent Notices

Consent notices inform users how personally identifiable information (PII) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PII. EnterpriseTrack helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PII your organization holds as part of EnterpriseTrack data.

Consent notices should:

▸ be written in clear language which is easy to understand.
▸ provide the right level of detail.
▸ identify the purpose and legal basis for your collection, processing, storage, and transmission of PII.
▸ identify whether data will be transferred to named third parties.
▸ identify PII categories and list the data which will be collected, processed, stored, and transmitted.

Cookies Usage

When using EnterpriseTrack, the server may generate cookies and send them to the user's browser. The user's machine stores the cookies, either temporarily by the browser, or permanently until they expire or are removed manually. Cookies might store Personally Identifiable Information (PII).

We might use cookies for authentication, session management, preferences, and provide documentation support.

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PII they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in EnterpriseTrack.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

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Personally Identifiable Information (PII) in EnterpriseTrack

PII might be visible in multiple areas of EnterpriseTrack including but not limited to user administration, resource and role administration, assignments, documents, reports, issues, risks, user-defined fields, and timesheets.

PII might be at risk of exposure in multiple areas of EnterpriseTrack including but not limited to project export, downloaded tables, reports, documents, API, exported BI data, emails, and mobile.

Security

Contact Oracle support to request logs specific to your account. You can only request logs for the last 90 days, logs beyond 90 days are automatically purged.

Depending on the size of the logs, they are either uploaded to your support ticket or shipped to your destination via ftp or sftp.

Authentication

To validate user identities, EnterpriseTrack supports (User ID and password) forms-based authentication, LDAP/Active Directory-based authentication, and various Single Sign-On (SSO)-based authentication mechanisms, including those based on SAML.

▶ **User Password** is the default mode for EnterpriseTrack. In User Password mode, the EnterpriseTrack database acts as the authority and the application handles the authentication of the user who is logging into that application.

▶ **Active Directory (AD)/LDAP** EnterpriseTrack can use an AD/LDAP server for user authentication. The server's details, such as its LDAP Provider URL, must be specified in EnterpriseTrack.

▶ **Single Sign-On (SSO)** EnterpriseTrack supports SAML-based SSO   and can use the user's Identity Provider to authenticate users. No additional SAML service provider software is needed.

Authorization

Grant authorization carefully to all appropriate EnterpriseTrack users. To protect against unauthorized access to your critical information, EnterpriseTrack supports fine-grained Roles-Based Authorization to control access to various objects and operations within the application.

To help you with security planning, EnterpriseTrack roles/permissions settings are configured by the Solution Architect using the requirements collected from the customer. These are detailed in the *EnterpriseTrack User's Guide* and the *EnterpriseTrack Application Administrator's Guide*.

Confidentiality

Confidentiality ensures only authorized users see stored and transmitted information. In addition to the documentation included with other applications and hardware components, follow the EnterpriseTrack-specific guidance below:

▶ For data in transit, use TLS with recommended and strong cipher suites to protect network connections among modules. If you use LDAP or SSO authentication, ensure you use LDAPS to connect to the directory server.
▶ For data at rest, refer to the documentation included with the database server for instructions on securing the database.
▶ For encryption in transit, use HTTPS by default.
▶ For encryption at rest, Total Data Encryption (TDE) in Oracle DB is available on demand for all new Cloud customer deployments. Existing Cloud customers may need to go through a migration in order to apply TDE if it is not applied already.

Enabling the Privacy and Security Feature

When the Privacy and Security feature is enabled, the following features and modules that allow the import or export of PII data are disabled:

▶ Data export
▶ Cron job/scheduled reports
▶ Data import/export
▶ Export listing page content
▶ Integration APIs
▶ Microsoft Project (MSP) data export
▶ Reports

You can choose to enable one or more of these features or modules from the Privacy Feature Settings page. For more information, see topic *Enabling or Disabling Privacy Feature Settings*.

After you enable the privacy and security feature, the Privacy Configuration tab   is displayed in the Administration console. The settings under this tab will allow you configure and manage your organization's privacy settings.

> **Notes**:
>
> - Ensure that you have read all the topics under Privacy Configuration to understand how enabling this feature could affect your application.
> - This feature is available only when the application is in Production or UAT mode.
> - Only the app_admin that was configured when the application was first downloaded can enable the privacy and security features.

To enable the Privacy and Security feature:

1) Select the **Application Configuration** tab.
2) Select the **Privacy & Security Feature** link.
3) Select the **Enable** checkbox.
4) Click **Update**.

Working with Privacy Configurations

You can use the Privacy Configuration tab to:

- configure a privacy policy and consent notice for the web application.
- configure consent notices for mobile users and administrators
- enable or disable features and modules that expose PII
- validate your privacy configuration
- provide consent for existing users
- reset the privacy consent status
- view consent status report

Configuring Web Privacy Policy Settings

From the Web Privacy Policy Settings page, you can create a privacy policy for your organization. You can choose to display the privacy policy as link in the footer of the application or require users to read the privacy policy and provide their consent . The privacy policy you set here is also used as the consent notice for the web application, and is displayed when users log in to the application for the first time. The application requires the default consent notices to be created in English.

For more information on enabling the privacy policy or displaying consent notices, see topic *Enabling or Disabling Privacy Feature settings.*

To configure a privacy policy for the web application:

1) Select the **Privacy Configuration** tab.
2) Select the **Web Privacy Policy Settings** link.

3) Select how you want to enter your privacy policy. Choose **HTML Text**, **Simple Text**, or **External Privacy Policy Web Page**.

4) If you selected HTML Text or Simple Text:
   a. From the **Languages** drop-down menu, select **English**.
   b. Enter and format the text. The character limit is 64000.

> **Note:** Work with your data security and legal teams to determine the wording of the privacy policy.

   c. Click the **Validate and Preview** button.
   d. Review and click the **Apply** button.

5) If you selected External Privacy Policy Web Page:
   a. From the **Languages** drop-down menu, select **English**.
   b. Enter external web link to your organizations web policy page.
   c. Click **Save**.

6) Repeat steps 3 to 5 for each additional language.

Mobile Consent Notice Configuration

To configure the mobile consent notice:

1) Select the **Privacy Configuration** tab.
2) Select the **Mobile Consent Notice Configuration** link.
3) From the **Languages** drop-down menu, select **English**.
4) Enter and format the text.

> **Note:** Work with your data security and legal teams to determine the wording of the consent notice.

5) Click the **Validate and Preview** button.
6) Review and click the **Apply** button.

For more information on requiring consent from users accessing the mobile app, see topic *Enabling or Disabling Privacy Feature settings.*

Application Administrator Consent Notice

To create a consent notice for application administrators:

1) Select the **Privacy Configuration** tab.
2) Select the **Application Administrator Consent Notice** link.
3) Select how you want to enter your privacy policy, choose **HTML Text**, or **Simple Text**.
4) From the **Languages** drop-down menu, select **English**.
5) Enter and format the text.

> **Note:** Work with your data security and legal teams to determine the

wording of the privacy policy.

6) Click the **Validate and Preview** button.
7) Review and click the **Apply** button.

Enabling or Disabling Privacy Features

When the Privacy & Security feature is enabled, all features and modules that may expose a user's PII are disabled. As an administrator, you can choose to enable these features for all users.

To enable privacy features:

1) Select the **Privacy Configuration** tab.
2) Select the **Enable Privacy Settings Feature**   link.
3) Select the checkbox next to the features you want to enable.
4) Click **Save**.

Tip:

Click the **View History** button to view details on all feature setting changes. You can download or print this information.

Feature or Module Name	Description
BI Data Export	Allow users to export data using BI Publisher.
Cron Job/Scheduled reports	Allow users to schedule cron jobs or reports.
Data Import/Export	Allow users to import or export data.
Export Feature for the treegrid on listing page	Allow users to export data from listing pages. The Export button on listing pages is enabled.
Integration (API)	Allow users to use integration APIs.
MSP Data Export	Allow users to export MSP data.
Reports	Allow users to generate reports. The Reports module is enabled.
Allow end user to export Profile data in CSV format	Allow users to export their profile data in CSV format from their My Profile page.
Display My Profile page to all users	Allow users to access their My Profile page even if they do not have the required navigation permission to view their profile.
Editing of mandatory My Profile data	Allow users to access and edit the required fields on their My Profile page. If this feature is disabled, users with the Create/Modify Resource permission can continue to edit their profile.

Display Privacy Policy	Display the privacy policy as a link on the footer of the application.
Require Resource Consent	Require users to provide consent to the privacy policy before accessing the application. The consent notice will be displayed when users or administrators log in to the web application or the mobile application. To enable this feature, you must first configure the default web privacy policy, mobile consent notice, and the application administrator consent notices in English.
	When this feature is enabled, users must consent to the use of their PII before they can be assigned to an idea, proposal, or project. The consent status for all existing users is changed to Consent Pending. As an administrator, you must provide your consent before you can enable this feature.

Validating Privacy Configuration

To validate your privacy configuration:

1) Select the **Privacy Configuration** tab.
2) Select the **Validate Privacy Configuration** link. You can choose print or download the results as a PDF.

Administering Privacy Configurations

Providing Consent for Existing Users

As an administrator, you can choose to provide consent on behalf of all users currently configured in the system. An email is sent to the users informing them that you have provided consent on their behalf. The Existing User Consent Setting link is disabled if all resources have provided their consent.

To provide consent for existing users:

1) Select the **Privacy Configuration** tab.
2) Select the **Existing User Consent Setting** link.
3) Select the **Exclude Active Resource** checkbox to allow active users to log in to the application and provide their consent.
4) Select the **I Agree** checkbox and click **Save**.

> **Note**: If you have provided consent on behalf of other users, it is your responsibility to ensure the consent has been provided by the users through other means.

Resetting the Privacy Consent Status

If you have modified the privacy policy, you can reset the consent status for all active users. Users are required to review the updated consent notice and provide their consent when they log in to the application. The consent status for all existing users is changed from Consent Provided to Consent Pending. You can also reset the mobile consent status.

The Reset Privacy Consent Status link is disabled   if no user has provide their consent.

To reset the privacy consent status:

1) Select the **Privacy Configuration** tab.
2) Select the **Reset Privacy Consent Status** link.
3) Select the **Reset User Mobile Consent Status** checkbox, to reset the mobile consent status.
4) Select the **I Agree** checkbox.
5) Click **Save**.

Viewing Consent Status Report

The Consent Status report displays details of all consents provided by users. The report displays the following columns: resource name, consent state, consent provided by, consent provided for, and consent provided on. This report outputs in CSV format.

1) Select the **Privacy Configuration** tab.
2) Select the **Consent Status Report**   link.
3) Select the filter parameter you want to use.
4) Click **Export**.

Resource and Security Admin

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Resource Administration

In This Section

Creating Application Administrators

Application Administrators perform various administrative functions to ensure that the system runs smoothly. They set up and manage the application and assign access rights or permissions for resources to access the system.

Application Administrators are associated with initiatives and have access to all projects within their initiative, including confidential project. They can also access all modules within EnterpriseTrack.

> **Note**: You cannot assign administrators to any projects.

To create an application administrator:

1) Click the **Resource & Security Admin** tab.
2) Select the **Application Administrators** link. The *Application Administrator List* page is displayed.
3) Click the **Add Application Administrator** button.
4) Enter a Login ID.
5) Enter the first name, last name and email address.

> **Note:** Passwords in the EnterpriseTrack system have to be a minimum of 8 characters and must contain both alpha and numeric values and at least one special character like *, $, or an underscore.

6) Select a status. Specify when the selected status should become effective.
7) Select the type of labor rate.
8) If your system is configured with multiple initiatives, select all initiatives that this application administrator is associated with from the **Associated Initiatives** field.
9) Enter any additional information under the Resource Details, Contact Info, Organizations, Preferences, and the Additional Resource Details sections.
10) If the Privacy & Security and the Require Resource Consent features are enabled, review the consent notice and provide consent on behalf of this administrator.
11) Click **Add Application Administrator**.

Unlocking a Resource

You can use the *Resource Locks* page to view and unlock all resources that are currently locked out.

To unlock a resource:

1) Click the **Resource & Security Admin** tab.
2) Select **Login Locks**.
3) In the **Action** column for the appropriate resource, click **Unlock**.

Assigning Permissions to System Access Profiles and Roles

Resources within EnterpriseTrack are assigned permissions based on their resource access profiles and the roles that they are allowed to perform. Before assigning permissions, it is important to understand how resource access profiles and roles are defined within the system.

System Access Profiles

Each resource in the EnterpriseTrack system must be assigned a system access profile. The system access profile determines a resource's global permissions. A resource can have only one system access profile.

Roles

Each resource in the EnterpriseTrack system can be assigned multiple roles. The roles determine the project specific permissions for any given resource in the system. Only resources that have at least one role assigned to them are available as potential team members of projects.

Editing Permissions

To begin managing permissions based on system access profiles and roles:

1) Click the **Resource & Security Admin** tab.
2) Click the **Edit Permissions** link.
3) In an installation with multiple initiatives on one system, you must first select the initiative that you want to modify.
4) Select the module you wish to modify.
5) Click the **Edit Permissions** button.

6) You will see a break-down of the various actions that can be performed within the selected module and a grid displaying the various system access profiles and roles that are available in the system. Use the check boxes to modify the permissions.

	Project Manager	Champion	Master Black Belt
Ideas			
Modify Idea	☐	☐	☑
View Confidential Submitter Details	☐	☐	☑
Accept/Reject Idea	☐	☐	☑
Delete Idea	☐	☐	☑

7) Click **Save**.

Notes:

- When an action cannot be performed based upon a system access profile or role, the system will not display a check box. An **n/a** sign will be displayed instead.

- All actions with the Knowledge Base have to be based on system access profiles, not roles, so there will be no check boxes in the Roles section of the page.

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Editing Administration Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Administration module. The list below describes the permissions you can select.

▶ **Configure Application**

Access the Administration module to configure EnterpriseTrack. This permission is typically given to administrators.

▶ **Manage Messages**

Manage the Messages module. From the Messages module users can send system-wide messages or send messages to a select group of users.

▶ **Create/Modify Resources**

Add, edit and delete resources. The Manage Resources link is enabled and displayed only if users have this permission.

▶ **Manage Languages**

Modify the language catalog.

▶ **Manage Survey Administration**

Manage and administer the Survey module.

▶ **Manage Survey Instances**

Create and edit surveys.

▶ **Save Layout For Access Profile**

Manage and save the layout (Home Page, Project Landing page, and Project Listing Columns) for each access profile.

▶ **Share Saved Search**

Select to allow users to share saved searches.

▶ **Execute APIs**

Execute integrations APIs. Typically this permission is given only to users who are integrating EnterpriseTrack with other programs or application.

▶ **Execute APIs as Proxy**

Execute integration APIs on behalf of others.

▶ **Manage Reference Calendars**

Create, edit, and delete Reference Calendars.

▶ **Manage Labor Expense Type Mapping**

Manage the Labor Expense Types. The Manage Labor Expense Types link is displayed only if users have this permission.

▶ **Modify Evaluation Weights**

Configure evaluation weights for proposals and ideas.

Editing Dashboard Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Dashboard module. Click to select the dashboard components you want a particular role or access profile to be able to access. Only the dashboard components you select here are editable through the Dashboard module.

Editing Finance Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Finance module. The list below describes the permissions you can select.

▶ **Manage Global Financial Settings**

Modify all setting under the Finance Management section. This permission is typically given to administrators.

▶ **Manage all Finance Templates and Finance Approval Templates**

Modify all finance templates and finance approval templates. The Manage Finance Template and the Mange Finance Approval Template are displayed only if this permission is enabled.

▶ **Manage Finance Templates and Finance Approval Templates for resource Initiative**

Manage finance templates and finance approval templates for resource initiative.

▶ **Update Inputs for Finance Fields (NPV, IRR etc)**

Update the finance fields within a project. This permission is typically given to a role, for example Project Finance Administrator.

▶ **Update Project Lock Month - Single View**

Update the lock month associated with a project. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Single View (Basic Only).

▶ **Update Project Lock Month - Plan**

Update the project lock month associated with the Plan view. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Update Project Lock Month - Actual**

Update the project lock month associated with the Actual view. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Update the Use Global Lock Month - Single View**

Update or delete the global finance lock month. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Single View (Basic Only).

▶ **Update the Use Global Lock Month - Plan**

Update or delete the global finance lock month associated with the Plan view. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Update the Use Global Lock Month - Actual**

Update or delete the global finance lock month associated with the Actual view. This permission is typically given to a role, for example Project Finance Administrator. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Project Finance Administrator**

Allow a particular role to be the designated project Finance Administrator. It allows them to update lock months at the project level.

▶ **Update Finance Tracking Start Date**

Update the finance tracking start date associated with a project.

▶ **Update Project's Finance and Approval Templates**

Update the project finance template and the project finance approval template.

▶ **Update Finance Snapshot Data**

Update and delete project finance snapshot data. The Snapshot button on the Detailed Finances tab is visible only if users have this permission.

▶ **Update Finance Data - Single**

Update finance data for projects. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Single View (Basic Only).

▶ **Update Finance Data - Plan**

Update the finance (Plan view) data for projects. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Update   Finance Data - Actual**

Update the finance (Actual view) data for projects. This permission is applicable only for projects using a finance template with the Data Entry Mode set to Double View (Plan and Actual).

▶ **Update Project Currency**

Update the project currency.

▶ **Manage Currencies and Conversion Rates**

Manage the currencies and conversion rates. The Manage Currencies and Manage Conversion Rates links are displayed in the Administration module when this permission is enabled.

▶ **Manage Group Finance Validation**

Validate finances across all projects. The Finance Validation button is displayed on the Project Listing page only if the permission is enabled.

▶ **Manage Project Finance Setting Excel Import/Export**

Manage the import/export of project finance setting using Microsoft Excel.

Editing Ideas Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Ideas module. The list below describes the permissions you can select.

▶ **Modify Idea**

Modify ideas.

▶ **View Confidential Submitter Details**

View confidential submitter details.

▶ **Accept/Reject Idea**

Accept or reject ideas.

▶ **Delete Idea**

Delete ideas.

▶ **Route Idea**

Route an idea for approval.

▶ **Own Idea**

Own ideas.

Editing Proposal Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to Projects. The list below describes the permissions you can select.

▶ **Modify Details before Initial Team Creation**

Allow editing the Details section of the proposal before the initial team is created.

▶ **Modify Details after Initial Team Creation**

Allow editing the Details section of the proposal after the initial team is created.

▶ **Modify Confidentiality before Initial Team Creation**

Allow editing the Confidentiality section of the proposal before the initial team is created.

▶ **Modify Confidentiality after Initial Team Creation**

Allow editing the Confidentiality section of the proposal after the initial team is created.

▶ **Assign Proposal Signoff Team Members**

Allow users to assign team members who can signoff on proposals.

▶ **Submit Proposal for Team Signoffs**

Allow users to submit proposal for team signoffs.

▶ **Hold/Un-Hold Proposal**

Allow proposals to be put on hold and to remove hold on proposals.

▶ **Edit Sign-offs on behalf of Other Team Members**

Allow signoffs to be modified on behalf of other team members.

▶ **Approve/Reject/Reopen Proposal**

Allows proposals to be approved, rejected, and reopened.

▶ **Accept Proposal and Create Project**

Creates a project when the proposal gets accepted.

Editing Project Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Projects. The list below describes the permissions you can select.

▶ **Create Confidential Documents**

Create confidential documents.

▶ **Create Quick Projects**

Create projects without starting from a proposal.

▶ **Manage Project Notifications**

Edit email notification settings at the project level using the Project Settings page.

▶ **Modify Project Basics**

Modify project basics.

▶ **Modify Project Manager**

Modify the Project Manager associate with a Project.

▶ **Modify Confidentiality**

Modify project confidentiality settings.

▶ **Modify Dates**

Modify project dates.

▶ **Modify Other Resource Tollgate**

Modify tollgates associated with other resources.

▶ **Modify Baseline Dates and Efforts Activities**

Modify an activity's baseline date and efforts.

▶ **Create Documents**

Create project documents.

▶ **Modify Documents**

Modify project documents.

▶ **Send Email to Project Members**

Email project team members.

▶ **Create Issues**

Create project issues.

▶ **Modify Issues**

Modify project issues.

▶ **Create Metrics**

Create project metrics.

▶ **Modify Metrics**

Modify project metrics.

▶ **Create Notes**

Create project notes.

▶ **Create Confidential Notes**

Create confidential notes.

▶ **Create Team Members**

Add project team members.

▶ **Modify Team Members**

Modify project team members.

▶ **Set Project On-Hold/Off-Hold**

Set a project on-hold or off-hold.

▸ **Close Projects**

Close projects.

▸ **Complete Projects**

Mark projects as complete.

▸ **Reopen Projects**

Reopen closed projects.

▸ **Request Approval for an Activity**

Request approval for an activity.

▸ **Approve Activity for Others**

Approve activity for others.

▸ **Create/Modify/Delete Activity at Top-Level for Roadmap**

Create, modify and delete top-level activities for roadmaps.

▸ **Create/Modify/Delete Activity Other Level for Roadmap**

Create, modify and delete activities for roadmaps.

▸ **Create/Modify/Delete Activity at the Top-Level for Non Roadmap**

Create, modify and delete top-level activities for non-WBS roadmaps.

▸ **Create/Modify/Delete Activity at Other Level for Non Roadmap**

Create, modify and delete activities for non-WBS roadmaps.

▸ **Reopen Top Level Activity**

Reopen a top level activity.

▸ **Advance Top Level Activity**

Advance top level activity.

▸ **Copy Projects**

Copy projects.

▸ **Delete Projects**

Delete projects.

▸ **Change Roadmap**

Change a project's roadmap.

▸ **Cancel/Reactivate Project**

Cancel or reactivate projects.

▸ **Export Microsoft Project Plan**

Export a Microsoft Project Plan.

▸ **Release Lock or Import MSP by Others**

Release lock and import from MS Project.

▸ **Manage Computation Mode**

Manage the computational Mode.

▸ **View Team Member Rate**

View team member rate.

▶ **Modify Team Member Rate**

Modify team member rate.

▶ **Override Team Member Rate**

Override a team member's rate.

▶ **Manage Labor Expense Type**

Manage Labor Expense Types.

▶ **Create Risks**

Create project risks.

▶ **Modify Risks**

Modify project risks.

Editing Programs Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to programs. The list below describes the permissions you can select.

▶ **Create Program**

Create programs.

▶ **Modify Program Details**

Modify program details.

▶ **Modify Program Manager**

Change the program manager associated with a program.

▶ **Assign Projects to Programs**

Add projects to a program. When this permission is enabled, the Associate Projects section is displayed on the Create Program and Edit Program pages.

▶ **Assign Proposals to Programs**

Add proposals to a program. When this permission is enabled, the Associate Proposals section is displayed when creating or editing proposals.

▶ **Can be Assigned as Program Manager**

Assign users with the selected access profile to the role of a program manager.

▶ **Delete Program**

Delete programs.

▶ **View Program Budget Section**

View the Program Budget section when creating, viewing, or editing programs. This permission only affects seeing the Program Budget section, it does not affect the finances that are shown in the associated Projects or Proposals Grid, nor does it affect the separate Program Finance Page. If a section is hidden all custom fields associated with that section are also hidden.

▶ **View Program Organization Section**

View the Program Organization section when creating, viewing, or editing programs. If a section is hidden, all custom fields associated with that section are also hidden.

▶ **View Program Statements and Notes Section**

View the Program Statements and Notes section when creating, viewing, or editing programs. If a section is hidden, all custom fields associated with that section are also hidden.

▸ **View Program Dates Section**

View the Program Dates section when creating, viewing, or editing programs. If a section is hidden, all custom fields associated with that section are also hidden.

▸ **Edit Program Risks**

Modify program risks.

▸ **Edit Program Issues**

Modify program issues.

▸ **Edit Program Activities**

Modify Program activities.

▸ **Resource can be a Program Issue Owner**

Allows user to be a program issue owner.

▸ **Resource can be a Program Risks Owner**

Allows user to be a program risk owner.

▸ **Resource can be a Program Activity Owner**

Allows user to be program activity owner.

▸ **View Program Evaluation Section**

View the Program Evaluation section when creating, viewing, or editing Programs.

▸ **Can Edit Program Evaluation Criteria**

Allow user to modify the evaluation impact values for Programs.

▸ **Can Change Program Evaluation Matrix**

Allow user to change the program evaluation matrix. You can change the Program evaluation matrix only when there are more than one active program evaluation matrices.

▸ **Can Edit Program Evaluation Weights**

Allow user to modify the Program evaluation weights on an individual program.

▸ **Create Documents**

Allow user to create documents for Programs.

▸ **Modify Documents**

Allow user to modify Program documents.

Editing Alignment (Strategy) Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to Alignment (Strategy). The list below describes the permissions you can select.

▸ **View Organization Alignment (#)**
▸ **View Non-Organization Alignment**
▸ **Add, Edit, and Delete Alignment (#) Nodes in resource organization**
▸ **Add, Edit, and Delete Alignment (#) Nodes in organizations other than resource organization**

▶ **Add, Edit, and Delete Nodes in Non-Organization Alignment (#)**
▶ **Specify a resource as the owner of a Alignment (#)**
▶ **Align Alignment (#) to an Idea**
▶ **Align Alignment (#) to a Proposal before Initial Team Creation**
▶ **Align Alignment (#) to a Proposal after Initial Team Creation**
▶ **Align Alignment (#) to a Project**
▶ **Trigger   Rollup Manually for Alignment (#)**
▶ **Resource can be Measure Owner of Alignment (#)**
▶ **View Idea Alignment to Alignment (#)**
▶ **View Proposal Alignment unassigned to Alignment (#)**
▶ **View Proposal Alignment Postassigned to Alignment (#)**
▶ **View Program Alignment to Alignment (#)**

Select to make the Alignment section for a particular alignment visible in the Program Basic page in view and edit modes. This permission also controls the visibility of the Program tab in the Alignment Details section.

▶ **Align Alignment (#)   to a Program**

Select to associate a program to an alignment from the Program Basic page in edit mode. This permission also controls the association of a program to the alignment node using the Programs tab in the Alignments Details section.

Editing Navigation Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Navigation module. You can enable the following modules:

▶ My Work
▶ My Preferences
▶ Ideas
▶ Programs
▶ Knowledge Base
▶ Resources
▶ Timesheets
▶ Reports
▶ Proposals
▶ Surveys
▶ Project Dates
▶ Project Documents
▶ Project Finances
▶ Project Import/Export
▶ My Messages
▶ Program Risks, Issues, Documents, and Activities

Within each project, you can also set permissions to view the following: project dates, project documents, project finances, project import/export, project issues, project metrics, project notes, project reports, project settings, project status report, project team, linked project, WBS work items, and non-WBS work items.

Editing Reports Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to the Reports module. Click to select the reports you want a particular role or access profile to be able to access. Only the reports you select here are editable through the Reports module.

Editing Status Report Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to status reports. The list below describes the permissions you can select.

▶ **Create/Edit Status Reports**

Create and edit status reports.

▶ **Approve/Reject Status Report**

Approve or reject status reports that were submitted.

▶ **Edit Approved Status Reports**

Make changes to approved status reports.

▶ **Delete Status Report**

Delete status reports.

Editing Resource Permissions

You can use the **Edit Permissions** page to edit role-based and access profile-based permissions related to resources. The list below describes the permissions you can select.

▶ **View Resource Assignments**

View all resource assignments.

▶ **View Resource Utilization Chart**

View the resource utilization chart for all resources.

▶ **Create and Edit Timesheet**

Create and edit timesheets.

▶ **Enter Non-Project Time**

Enter non-project time in timesheets.

▶ **Enter Non-Working Time**

Enter non-working time in timesheets.

▶ **Enter Project Level Time**

Enter project level time in timesheets.

▶ **Enter Activity Level Time**

Enter time at the activity level in timesheets.

▶ **Delete Timesheet**

Delete their timesheets if the timesheet status is Open, Submitted, or Rejected during the Timesheet Open Period.

▶ **View Other Resource Timesheets**

View all resource timesheets.

▶ **Re-open Approved Timesheet**

Edit all approved timesheets.

▶ **Delete Other Resource Timesheet**

Delete timesheets submitted by other resources, if the timesheet status is Open, Submitted, or Rejected during the Timesheet Open Period.

▶ **Allow Resource Manager to Approve (or Reject) Project Line Items**

Allow the Resource Manager of the timesheet submitter to also approve/reject project line items.

▶ **Manage Timesheet Periods**

Set a timesheet close period, reopen timesheets for correction, and run timesheet status reports.

▶ **Approve Resource Requests for all Roles**

Approve project resource requests for all roles.

▶ **Approve Resource Requests for   Allowed Roles**

Approve resource requests for allowed roles. You can only approve requests for roles that you are assigned to.

▶ **Approve Resource Requests for other Approvers**

Approve resource requests for approvers.

▶ **View Resource Utilization Tab**, **View Resource-Gantt Tab**, **View Resource-Heatmap Tab**, **View Resource-Assignments Tab**, **View Resource-Rate Tab**, **View Resource-Expertise Tab**, **View Resource-Certifications Tab**

View the Resource Utilization, Resource-Gantt, Resource-Heatmap, Resource-Assignments, Resource-Rate, Resource Expertise, and the Resource-Certification tabs on the Resource Listing page.

▶ **Edit All Resource Certifications**

Allow resource to create and edit certifications.

▶ **Edit All Resource Assets**

Allow resource to create and edit assets.

▶ **Allow user to view/Search login ID**

View and search login IDs.

▶ **View All Resource Calendars**

View all resource calendars.

▶ **Edit All Resource Calendars**

Edit all resource calendars.

▶ **Edit My Resource Calendar**

Edit only their calendar.

▶ **Modify Resource Confidentiality**

Modify confidentiality for resources.

Resource Configuration

In This Section

Managing Resources

A resource is any person or equipment that you can track and assign to project activities. Resources perform roles within projects. Each resource is associated with an Access Profile and at least one role.

From the **Resources** link, you can add, edit, and delete resources. You can also manage their profile, area of expertise, certification, assets, calendar, rate, and password.

> **Note:** As all PII data is editable and does not play a part in database-key integrity, you can manually encode or tokenize any PII field without sacrificing data integrity.

In This Section

Adding Resources

You can use the **Add New Resource** page to add resources to your system. You must have the appropriate permissions to add resources. Once you have created a new resource, you can use the **Edit** option to update a resource profile to include certifications and assets.

> **Note:** You must complete all mandatory fields highlighted in red.

To create a new resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Select **Create > Resource**. The *Add New Resource* screen is displayed.

Entering Resource Details

1) Choose the type of resource: **Equipment** (if enabled) or **Person**. The information fields change depending on the resource type you selected.

2) If you selected resource type **Person**, enter a Login ID, First Name, and Last Name. If you selected resource type **Equipment**, enter a Login ID, the Make, Resource Name, Owner First Name and Owner Last Name.

3) Select an Access Profile. All resources in the system must have an Access Profile.

4) Select a status. The default status is **Active**.

5) Specify when this resource status should become effective.

6) Enter the user authentication mode. This field displays only if the default user authentication mode was set to LDAP or SSO.

7) Enter a password. This field appears only if the user authentication mode is set to User Password.

8) Enter an Email address.

Selecting an Organization

1) Select a division. The other fields are populated based on the value you select here.

2) Enter a business unit and business subunit.

Selecting Time Reporting, Calendar, and Rates

1) Select a calendar. The default calendar is the Standard Calendar.

> **Note:** You must associate a resource with a calendar. The resource calendar is used to calculate resource utilizations.

2) Select the type of labor rate. If you select **Use Role Rate**, then the labor rate for this resource is based on the rate associated with their role. If you select **Use Resource Rate**, enter the standard, overtime, or setup labor rates.

Selecting Initiatives and Roles

1) From the Associated Initiatives selection box, select all initiatives associated with this resource.

2) From the Roles selection box, select the roles this resource can perform within each initiative. You can select multiple roles for a user. In single initiative systems, you must select at least one role.

3) From the Access selection box, select the access this resource has. This field is displayed only if the selected initiative has user based confidentiality.

Providing Consent

This section is displayed only if your administrator has enabled the Privacy & Security and the Require Resource Consent features. Review the consent notice and provide initial consent on behalf of this resource. An email is sent informing them that you have provided initial consent. Users will be required to review the consent notice and provide their consent when they first log in to the application. If you are adding an equipment or configuring an inactive resource, no additional consent notice is displayed as they cannot log in to the application.

Adding Additional Information, Selecting Preferences and Areas of Expertise

1) Click the **Additional Information** tab.
2) Enter any additional information under the Contact Information and Additional Resource Details sections.
3) Select default preferences for this resource.
   ‣ **Date Format**: Select how you want dates to be displayed.
   ‣ **Date Separator**: Select how you want the date, month, and year to be separated.
   ‣ **Time Format**: Select how you want the time to be displayed.
   ‣ **Language**: Select your language. All system-generated emails are also displayed in the language you select here.
   ‣ **Use Browser Language**: Select this check box to make the language displayed by EnterpriseTrack match your browser's language setting. When the Use Browser Language check box is not selected, EnterpriseTrack is displayed in the language selected in the Language drop-down list.
   ‣ **Include Archived Pull Downs in Filter**: Select this check box if you want to view archived pull-down values in filters.
   ‣ **Include Invalid Pull Downs in Filter**: Select this check box if you want to view invalid pull-down values in filters.
4) From the list of Available Areas box, select the areas of expertise.
   a. To add an area of expertise to the list, click the **Add** link next the *Selected Areas* label.
   b. Enter a name and click **OK**.

Adding Resource Custom Fields

1) Click the **Resource Custom Fields** tab.
2) Enter values for any custom fields that are configured. If your administrator has configured a tool tip, you can mouse over the **Information** icon to view the help text.
3) Click **Add Resource**.

Editing Resources

You can edit a resource profile to:

‣ Update personal information.

▸ Manage certifications and assets.

▸ Update area of expertise.

▸ Change passwords. The Change Password button is displayed only if the authentication mode is User Password.

To edit a resource profile:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource profile you want to edit and select **Actions** > **Edit**. You can choose to edit the Details, Area of Expertise, Certification, Assets, Calendar, and Rates.

3) From the Edit Resource page, make all the necessary changes.

4) Click **Update**.

Managing Certifications

From the *Resource List* page, you can view, add, edit, and delete certifications associated with a resource profile. Adding certification information to a resource's profile is one way to ensure that a resource's skills are appropriately matched with a project's requirements.

Viewing Certifications

To view certifications:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, choose **Select**.

4) Click the **Certifications** tab.

Adding Certifications

To add certifications:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, select **Edit** > **Certifications.**

4) Click the **Add Cert** button. The *Add New Certifications* page is displayed.

5) Enter all the relevant information.

6) Click **Add Cert**.

Editing Certifications

To edit the details of an existing certificate:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, select **Edit** > **Certifications**.

4) Click the **Certification ID** link to select the certification you want to edit. The *Edit Certification Info* page is displayed.

5) Make the necessary changes and click **Update**.

Deleting Certifications

To delete an existing certification:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, select **Edit** > **Certifications**.

4) Click the **Certification ID** link to select the certification.

5) Click **Delete**.

6) Click **OK** to confirm the deletion.

Managing Assets

You can use the *Resource Listing* page to view, add, edit, or delete assets associated with a resource. An asset may include items like laptop, pager, cell phone etc.

Viewing Assets

To view assets associated with a resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, choose **Select**.

4) Click the **Assets** tab.

Adding Assets

To add assets:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.

2) Locate the resource.

3) From the **Actions** menu, select **Edit** > **Assets.**

4) Click the **Add Asset** button. The *Add New Asset* page is displayed.

5) Enter a serial number for the asset.

6) Select the type of asset.

7) Enter a description for this asset.

8) Click **Add Asset**.

Editing Assets

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Assets**.
4) Click on the **Asset ID** link to select the asset you want to edit. The *Edit Asset Info* page is displayed.
5) Make the necessary changes and click **Update**.

Deleting Assets

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Assets**.
4) Click on the **Asset ID** link to select the asset you want to delete. The *Edit Asset Info* page is displayed.
5) Click **Delete** to remove the asset.
6) Select **OK** to confirm the deletion.

Changing Passwords

To change a resource password:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource.
3) From the **Actions** menu, select **Edit** > **Details.** The *Edit Resource Info* page is displayed.
4) Click the **Change Password** button.
5) Enter a new password.
6) Enter the same password in the Confirm Password field.
7) Click **Change**.

> **Note:** A password must be at least 8 characters long and contain at least one character that is not alphanumeric, an underscore or white-space. E.g. *, %, $ etc.

Deleting Resources

To delete a resource:

1) From the Top Navigation bar, select **Go To > Resources > Listing**. The *Resource Listing* screen is displayed.
2) Locate the resource profile you want to delete. You can use the **Quick Filter** to help you find a resource.
3) From the **Actions** column, select **Delete**.

4) Click **OK** to confirm the deletion.

> **Notes:**
>
> - The system may require you to delete a resource's assets and certifications before deleting a resource.
> - You cannot delete a resource that is currently assigned to a project. You have to reassign the project to another resource.

Reset User Consent Status

You can reset the consent status of users who have previously withdrawn their consent. This option is displayed only if the Privacy & Security and the Require Resource User Consent features are enabled.

To reset the consent status of a user:

1) From the Top Navigation bar, select **Go To > Resources > Listing**.
2) Select the resource and click ⚙ **> Reset Consent Status**.

Using Search, Advanced Search, and Saved Search

EnterpriseTrack allows you to filter your resource list in multiple ways. You can search for a specific name, view all last names beginning with a particular letter or filter by other criteria using the sophisticated filtering engine.

Searching for a Resource

To search for a specific name, enter the appropriate letter in the Last Name Starts with field and click the **Go** 🔵 icon. You will see a list of resources matching the search criteria you entered.

Modifying Advanced Search

To modify the advanced search setting:

1) Click the **Advanced Search** link.
2) On the Advanced Search page, enter the appropriate values, check the appropriate boxes or choose from the pull-down menus.
3) You can view the current search criteria by clicking the **Show Current Search Criteria** field.
4) Enter your selection criteria in the relevant fields. In most systems, you will be able to filter by Initiative, title, location or work address and organizational unit.
5) Click the **Search** button to apply the search and return to the list of projects.

> **Note:** When you choose to include the documents field in the keyword definition, the system will search through the text of the uploaded project documents.

Managing Saved Search Criteria

To save a new search:

1) From the **Manage** pull-down menu select **Create**.
2) Enter a new name in the Filter name field and enter a description.
3) Select if you want to make this the default search.
4) Select if you want to share this search with other users.
5) Specify the appropriate values, check the appropriate boxes or choose from the pull-down menus.
6) Click the **Save Search** button.

To edit an existing search:

1) From the **Saved Search: View** menu select the search you want to edit.
2) From the **Manage** pull-down menu select **Edit**.
3) Select the search you want to modify from the **Load a Saved Search** pull-down menu.
4) Make the required changes in the various fields used to specify the search criteria.
5) Click the **Save Search** button.

To delete an existing search:

1) From the **Saved Search: View** menu select the search you want to delete.
2) From the **Manage** pull-down menu select **Edit**.
3) Click the **Delete Search** button.

> **Note:** Only user-defined searches can be deleted.

To reset filters to default values:

From the *Advanced search* page, click the **Reset Filter** button.

Managing Resource System Access Profiles

Resource access profiles allow you to define global (non-project specific) permissions within the system. All resources assigned to a resource system access profile have all the global permissions associated with their selected access profile. You can use the *Manage Resource Access Profile* page to create and manage all access profiles defined in your system. You can also define the default project listing columns, and the project landing page that will display for each resource access profile. All resources in the system must have an access profile and each resource can have only one access profile.

In This Section

Creating Resource System Access Profiles

To create a resource system access profile:

1) Select the **Resource & Security Admin** tab.

2) Select the **Resource System Access Profile** link. The *Resource Access Profiles List* page displays.

3) Click **Create a New Resource Access Profile**.

4) Enter a name for this access profile.

5) Choose a homepage for this profile. All resources with this system access profile will be taken to this page when they log in.

6) Specify a project landing page. When a resource accesses a particular project, they will be taken to the page specified here.

7) Click **Add Access Profile**.

Editing Resource System Access Profiles

To edit a resource access profile:

1) Click the **Resource & Security Admin** tab.

2) Select the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays all existing access profiles.

3) Click on the name of the resource profile you want to edit.

4) Modify the name of this profile.

5) Click **Update**.

Configure Default Project Listing Columns

You can use the *Resource Access Profiles List* page to customize columns on the Project Listing page.

To configure default project listing columns:

1) Click the **Resource & Security Admin** tab.

2) Select the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays a list of all existing system access profiles.

3) Click the **Configure Default Project Listing Columns** button.

4) Use the **>** and **<** buttons to add and remove columns. Use the **Up** and **Down** buttons to move the selected columns to the left or right. The topmost column is displayed on the farthest left of the screen.

5) Click **Update**.

Specifying Home Page by System Access Profile

To specify the home page by resource access profile:

1) Click the **Resource & Security Admin** tab.

2) Click the **Resource System Access Profiles** link. The *Resource Access Profiles List* page displays all existing system access profiles.

3) Select an access profile by clicking on its name.

4) Select a home page from the pull-down menu. All resources with this access profile will be taken to this page when they log in.

5) Specify a project landing page. When a resource accesses a particular project, they will be taken to the page specified here.

6) Click **Update**.

> **Note:** For more information on removing certain menu items from the Left Navigation bar for users with specific access profiles and for specific roles, see topic *Assigning Permissions to System Access Profiles and Roles* (on page 20).

Managing Resource Roles

Roles represent job titles or skills needed to execute project tasks. Manager, Finance Representative, Engineer, Architect, IT Manager, Network Administrator are all examples of possible roles. You will see a standard set of roles that are applicable to your organization already defined for you. You can create as many roles as you need. You can also assign resource to one or more roles. Roles also determine the project specific permissions for each resource in the system. Only resources with at least one role assigned to them are available as potential team members of projects.

You can use the **Resource Roles** link, to add, edit, or delete resource roles. You can also edit labor rates associated with a role and view the rate change history.

In This Section

Creating Resource Roles

To create a resource role:

1) Click the **Resource & Security Admin** tab.

2) Click the **Resource Roles** link. The *Team Composition Settings* page displays all the existing resource roles.

3) Click **Add a New Role**.

4) Select an initiative for this role

5) Enter a name for this role.

6) Enter the Sort Order ID. This defines the order in which it displays on listing pages.

7) Select the type of proposal sign off you require for this role (**Context-Sensitive**, **Signoff Not Required**, **Signoff Required**, and **Signoff Optional**).

   If you selected the Context-Sensitive option, enter the conditions when signoff is required. The Context-Sensitive option displays only if the role is part of the initial project team.

8) Enter the standard labor, overtime labor, and setup labor rates associated with this role.

9) Enter the number of hours per week this role will spend of different project categories. For example: Project Management, Team Meetings, etc.

10) Click **Create**.

> **Note**: In Reconfigure mode, you can change the number of resources assigned to a role only if no records were created. If records were created, you can only increase the number resources assigned to the role.

Editing Resource Roles

To edit a resource role:

1) Click the **Resource & Security Admin** tab.

2) Select the **Resource Roles** link. The *Team Composition* page displays all the existing resource roles.

3) Click **[Edit]** next to the name of the resource role you want to edit. The *Edit Role* page displays.

4) Edit the resource role.

   a. Modify the name for this role.

   b. Change the Sort Order ID. This defines the order in which it displays on listing pages.

   c. Select if you want this role to be part of the initial proposal team.

   d. Select if this role is required for the entire project duration.

   e. Select the type of proposal sign off you require for this role **(Context-Sensitive**, **Signoff Not Required**, **Signoff Required**, and **Signoff Optional**).

      If you select the Context-Sensitive option, enter the conditions when signoff is required. The Context Sensitive option displays only if the role is part of the initial proposal team.

   f. Modify the number of hours per week this role will spend of different project categories. For example: Project Management, Team Meetings, etc.

5) Click **Update**.

> **Note**:   In Reconfigure mode, you can change the number of resources assigned to a role only if no records were created. If records were created, you can only increase the number resources assigned to a role.

Editing Labor Rates for Roles

To edit labor rates for all resources associated with a role:

1) Click the **Resource & Security Admin** tab.
2) Select the **Resource Roles** link. The *Team Composition Settings* page displays all the existing resource roles.
3) Select a role and click the **[Edit Rate]** link next it.
4) Edit the current Standard, Overtime, and Setup rates, or click **[Add Row]** to add a new row to the rate table.
5) Click the **Calendar** icon and select the effective start date.
6) Click **Update**.

Viewing Rate Change History

To view all the labor rate changes associated with a role:

1) Click the **Resource & Security Admin** tab.
2) Click **Resource Roles**. The *Team Composition Settings* page is displayed.
3) Select a role and click the **[Edit Rate]** link next it.
4) Click the **[View rate change history]** link.

Managing Resource Status

Use the *Resource Status* screen to create and manage multiple resource statuses. For example, you can create a status called *Inactive Transferred*, for resources that no longer work for your organization, or *Resource Active* for resources that are currently employed.

> **Note:** Once you create a status, you cannot delete it. You can only change the status to Inactive, or Archived.

To add a new resource status:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource Status** link. The *Resource Status List* screen is displayed.
3) Click the **Create a New Resource Status** button.
4) Enter a name for this status.
5) Click **Create**.

To manage resource statuses:

1) Click the **Resource & Security Admin** tab.

2) Click the **Resource Status** link. The *Resource Status List* screen is displayed.
3) Select a resource status from the list.
4) Change the status to **Valid**, **Invalid**, or **Archived**.
5) Click **Update**.

Managing Resource Rate Default Rule

You can specify the default resource or role rate that the system displays when creating new resources or roles.

To set the resource or role rate default rule:

1) Click the **Resource & Security Admin** tab.
2) Click the **Resource or Role Rate Default Rule** link.
3) Select **Resource labor rate** or **Role labor rate**.
4) Click **Update**.

Setting TBD Capacity in Resource Modules

Use the **Include TBD Capacity in Resource Modules** link to select if you want to include or exclude TBD (To Be Decided) resource when calculating role capacity. If set to **Yes**, then TBD capacity is included when calculating capacity. If set to **NO**, then TBD capacity is not included when calculating capacity, only the demand is included.

To set TBD capacity:

1) Select the **Resource & Security Admin** tab.
2) Click the **Include TBD Capacity in Resource Modules** link.
3) From the **Value** pull-down menu, choose **Yes** or **No**.
4) Click **Update**.

Setting Default Percentage Utilization

Use the **Set Default Percentage Utilization** link to select the default resource/role percentage utilization for each initiative configured in your system. The default value you set here is used to pre-fill the percentage utilization for all resource or role allocations.

To set the default percentage utilization:

1) Select the **Resource and Security Admin** tab.
2) Click the **Default Percentage Utilization** link.
3) Enter a value for each initiative configured in your system.
4) Click **Update**.

Resource Admin Reports

In This Section

Usage Statistics Report

Use the **Usage Statistics Report** to view account usage. This report displays the following information:

- The number of initiatives loaded.
- A count of resources that accessed the system in the past 7 to 180 days.
- A count of projects updated in the past 7 to 180 days by initiative.
- The number of Ideas created.
- A count of proposals by initiative and status.
- Project Information
  - A count of projects by initiative.
  - A count of projects by initiative and status.
  - A count of project components
- Resource Information
  - The total number of active resources across all projects, realization projects, and completed projects.
  - The number of Project Managers with active projects grouped by initiative and access profile.
  - The number of Project Managers with active projects.
  - The number of resources with Project Leader/Project Manager role by initiative and access profile.
  - The number of active resources by initiative and access profile.
  - The number of active resources by initiative.
  - The total number of resources by initiative.
- System Information
  - A count of system components

To view the Usage Statistics Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Usage Statistics Report** link.

Permissions Report

Use the **Permissions Report** to view all resource access profiles and roles with their permissions.

To view the Permissions Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Permissions Report** link.

Last Login Report

Use the **Last Login Report** to view a log of all users who attempted to log into the system, login date, user ID, login ID, email address, first name, last name and the success of the login.

To view the Last Login Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Last Login Report** link.

Scheduled Reports by Resource Report

Use the Scheduled Reports By Resource Report to view a list of reports scheduled by resources. This report is generated in CSV format and includes the following information:

- user report name
- standard report name
- if the report is emailed
- email address (To, CC, and BCC) of the resources it is sent to
- day of the week, day, month, and year the report is scheduled to run
- scheduler's email address
- scheduler's name
- scheduler's status
- date of the last report run attempt

To view the Last Login Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Scheduled Reports by Resource Report** link.

Confidential Project Count by Resource Report

Use the Confidential Project Count by Resource Report to view a list of all confidential projects in the system. This report is generated in CSV format and includes the following information:

- count of confidential projects
- project manager's email address
- project manager's first name and last name
- project manager's status

To view the Confidential Project Count by Resource Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Confidential Project Count by Resource Report** link.

Setting Resource Heat Map Thresholds

Use the **Set Resource Heat Map Thresholds** link to edit the thresholds that control the colors in heat maps, including the Resource Planning List page, What-if View Scenario page, and all heat map reports.

To set the heat map thresholds:

1) Select the **Resource & Security Admin** tab.
2) Click the **Resource Heat Map Thresholds** link.
3) Edit the default Upper Threshold % column value for the Green, Amber and Red rows. The Lower Threshold % column value is automatically set based on the Upper Threshold %.
4) Click **Update**.

Timesheet Settings

In This Section

Configuring Time Reporting Categories

In This Section

Configuring Categories for Project Related Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

1) Click the **Resource & Security Admin** tab.
2) Click the **Project Time Reporting Categories** link. All the available categories are listed, by initiative.
3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Project Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.

2) Click the **Non-Project Time Reporting Categories** link. All the available categories are listed, by initiative.

3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Working Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.

2) Click the **Non-Working Time Reporting Categories** link. All the available categories are listed, by initiative.

3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note**: Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Resource Admin Reports

In This Section

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Use the **Usage Statistics Report** to view account usage. This report displays the following information:

▸ The number of initiatives loaded.

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▸ The number of Ideas created.

▸ A count of proposals by initiative and status.

▸ Project Information

  ▸ A count of projects by initiative.

  ▸ A count of projects by initiative and status.

  ▸ A count of project components

▸ Resource Information

  ▸ The total number of active resources across all projects, realization projects, and completed projects.

  ▸ The number of Project Managers with active projects grouped by initiative and access profile.

  ▸ The number of Project Managers with active projects.

  ▸ The number of resources with Project Leader/Project Manager role by initiative and access profile.

  ▸ The number of active resources by initiative and access profile.

▸ The number of active resources by initiative.

▸ The total number of resources by initiative.

▸ System Information

▸ A count of system components

To view the Usage Statistics Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Usage Statistics Report** link.

Permissions Report

Use the **Permissions Report** to view all resource access profiles and roles with their permissions.

To view the Permissions Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Permissions Report** link.

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Use the **Last Login Report** to view a log of all users who attempted to log into the system, login date, user ID, login ID, email address, first name, last name and the success of the login.

To view the Last Login Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Last Login Report** link.

Scheduled Reports by Resource Report

Use the Scheduled Reports By Resource Report to view a list of reports scheduled by resources. This report is generated in CSV format and includes the following information:

▸ user report name
▸ standard report name
▸ if the report is emailed
▸ email address (To, CC, and BCC) of the resources it is sent to
▸ day of the week, day, month, and year the report is scheduled to run
▸ scheduler's email address
▸ scheduler's name
▸ scheduler's status
▸ date of the last report run attempt

To view the Last Login Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Scheduled Reports by Resource Report** link.

Confidential Project Count by Resource Report

Use the Confidential Project Count by Resource Report to view a list of all confidential projects in the system. This report is generated in CSV format and includes the following information:

- count of confidential projects
- project manager's email address
- project manager's first name and last name
- project manager's status

To view the Confidential Project Count by Resource Report:

1) Click the **Resource & Security Admin** tab.
2) Click the **Confidential Project Count by Resource Report** link.

Setting Resource Heat Map Thresholds

Use the **Set Resource Heat Map Thresholds** link to edit the thresholds that control the colors in heat maps, including the Resource Planning List page, What-if View Scenario page, and all heat map reports.

To set the heat map thresholds:

1) Select the **Resource & Security Admin** tab.
2) Click the **Resource Heat Map Thresholds** link.
3) Edit the default Upper Threshold % column value for the Green, Amber and Red rows. The Lower Threshold % column value is automatically set based on the Upper Threshold %.
4) Click **Update**.

Timesheet Settings

In This Section

Configuring Timesheet Creation Defaults

Use the *Timesheet Creation Defaults* page to set the default display of the *Timesheet Create* page for all timesheet users. The default timesheet categories you select here are displayed when new timesheets are created by users. Users have the option to modify these default settings.

To select the timesheet creation defaults:

1) Click the **Resource & Security Admin** tab.
2) Click the **Timesheet Creation Defaults** link.

3) For the Display Project Time Reporting category, select from one of the following options: **Show All Projects**, **Show Zero Projects**, or **Show Projects from Previous Period**.

4) Select the check boxes **Display Non-Project Time Reporting Categories** and **Display Non-Working Time Reporting Categories** to display these categories when new timesheets are created.

5) Click **Save**.

Configuring Time Reporting Categories

In This Section

Configuring Categories for Project Related Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

1) Click the **Resource & Security Admin** tab.

2) Click the **Project Time Reporting Categories** link. All the available categories are listed, by initiative.

3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Project Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.

2) Click the **Non-Project Time Reporting Categories** link. All the available categories are listed, by initiative.

3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note:** Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Configuring Categories for Non-Working Time Reporting

EnterpriseTrack allows users to complete and submit timesheets for reporting the time spent on various project related and non-project related activities. The different categories for reporting time have to be created within the Time Reporting Categories section in the Administration module.

To create and manage non-project related time reporting categories:

1) Click the **Resource & Security Admin** tab.

2) Click the **Non-Working Time Reporting Categories** link. All the available categories are listed, by initiative.

3) To modify an existing category, click the name of the category.

4) To create a new category, click the **Create** button.

5) Specify whether it is a global category which will be available to users across initiatives. If not, you must choose the initiative with which it is to be associated.

6) Enter a category name and an order ID.

7) Click **Update** or **Create** as appropriate to save your changes.

> **Note**: Once a category is associated with a specific initiative it cannot be made a global category. You can create a new global category with the same name.

Managing Estimated Time to Complete for Timesheet Settings

To enable the Estimated Time to Complete (ETC) field for timesheets:

1) Click the **Resource & Security Admin** tab.

2) Select the **Manage Estimated Time To Complete For Timesheet Settings** link.

3) Choose an initiative and click the **[Edit]** link next to it. The *Edit Estimated Time to Complete for Timesheet Settings* screen is displayed.

4) Choose if you want to enable the ETC field for timesheets.

5) Choose if you require resources to enter their ETC for activities before submitting their timesheets.

6) Click **Update**.

Manage Allowed Grace Period in Days for Activities in Timesheet

To change the grace period for timesheet reporting:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage Allowed Grace Period In Days For Activities in Timesheet Settings** link.
3) Choose an initiative and click the **[Edit]** link next to it. The *Edit Allowed Grace Period In Days For Activities In Timesheet Settings* screen is displayed.
4) Specify how many days past the activity completion date can team members continue to report effort.
5) Specify how many days before the activity start date can team members start reporting effort.
6) Click **Update**.

Security Administration

In This Section

Managing Resource Password Hint Questions

You can use the *Manage Resource Password Hint Questions* page to create and manage hint questions. The questions are emailed to a resource when they forget their password.

To manage password hint questions:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage resource password hint questions** link.
3) Click the **Create Question** button.
4) Enter a question.
5) Click **Create**.

To edit a question:

1) Click the **Resource & Security Admin** tab.
2) Select the **Manage resource password hint questions** link.
3) From the **Actions** column, click **Edit**.
4) Make the required changes on the *Edit Question* page and click **Update**.

To delete a question:

▶ From the **Actions** column, click the **Delete**.

Managing Portal Settings

You can use the *Portal Settings* page to create a user ID and password to access the Idea Portal. Users can use this ID and password to enter the Idea Portal without to logging into EnterpriseTrack.

1) Select the **Resource & Security Admin** tab.
2) Click the **Portal Settings** link. The *Edit Portal Settings* screen is displayed.
3) Enter a portal ID and Password.
4) Click **Update**.

Managing Login Warning Message

You can use the *Login Warning Message* page to add any warning message or terms of use you would like displayed on the Login screen.

To edit the login warning message:

1) Select the **Resource & Security Admin** tab.
2) Click the **Login Warning Message** link. The *Edit Login Warning Message* screen is displayed.
3) Enter the message.
4) Click **Update**.

Configuring IP Address Restriction

You can use the Configure IP Address Restriction page to restrict EnterpriseTrack login access and Portal access to specified IP addresses. You can specify IP address in X.X.X.X format (where X ranges from 0 to 255), or a CIDR IP address in X.X.X.X/N format (where X ranges from 0 to 255 and N from 8 to 32).

To enter the addresses:

1) Select the **Resource & Security Admin** tab.
2) Click the **Configure IP Address Restriction** link.
3) Click **Add Valid IP Addresses**.
4) Enter the IP addresses.
5) Select the check box Restrict Access to Idea Portal to allow users from the specified IP address to access the Idea Portal.
6) Select the check box Restrict Login Access to allow users from the specified IP address to access the EnterpriseTrack login.
7) Click **Save**.

Temporary Administrator Settings

To activate a temporary administrator:

1) Select the **Resource & Security Admin** tab.
2) Click the **Temporary Administrator Settings** link.
3) Select **Activate** from the **Temporary Administrator State** option.
4) Click the **Calendar** picker and select a deactivation date.
5) Enter the first name and last name of the temporary administrator.
6) Enter an email address.
7) Select when you want the temporary password to expire.
8) Click **Update**.

To deactivate a temporary administrator:

1) Select the **Resource & Security Admin** tab.
2) Click the **Temporary Administrator Settings** link.
3) Select **Deactivate** from the **Temporary Administrator State** option.

Application Configuration

In This Section

Configuring Roadmaps

A roadmap or WBS (Work-breakdown Structures) is a hierarchical arrangement of activities, tasks or milestones that are required to complete a project. A roadmap divides a project into discrete phases or top-level activities and each phase is further broken down into multiple work elements or tasks. A roadmap is associated with one or more activity templates or phases and each activity template contains one or more activities. These activities can be tasks, deliverables, milestones, or tollgates.

The process of configuring roadmap involves the following steps:

1) Creating activity subtypes. Typically, these are defined only for top-level activities or phases. Activity subtype is the name that displays in the User Interface for a phase or a top-level activity.

2) Configuring an activity template for each phase or top-level activity you have defined in your system.

3) Populating an activity template with work elements or activities.   An activity template contains multiple activities like tasks, deliverables, tollgates, etc.

4) Configuring a roadmap (WBS).

5) Populating a roadmap with phases or activity templates.

6) Associating a roadmap with project types.

7) Creating resource assignment types

Once you have configured roadmaps, Project Managers can use these pre-defined roadmaps to quickly plan and execute projects.

You can also create non-WBS roadmaps, which are a set of activities that are associated with a project but are not part of the project WBS. For example, change requests, issues, notes, etc.

> **Note:** Some of the choices you see while creating activity templates and roadmaps are determined during the initial system configuration.

In This Section

Creating Activity Sub Types

Activity sub types are the user visible names for the phases or activity templates you have defined. For example for the activity template *Phase*, you can have a sub type called *Planning*, or *Testing*.

To create activity sub types:

1) Click the **Application Configuration** tab.

2) Select the **Activity Sub Types/ Phase Name** link.

3) Click the **Create a New Activity Sub Type** button.

4) Select the activity type from the drop-down menu. For example, Phase.

5) Enter a name for this activity sub type. For example, you could create a sub type called Requirements Analysis, Planning, Designing, or Testing.

6) Enter the lower and upper cycle time range (in days). This is the upper and lower duration range for this activity sub type.

7) Click **Create**.

Working with Activity Templates

You can create activity templates for each phase of your project, and each activity template can be configured to have an ordered list of tasks and deliverables. You can specify tools, create tollgates, set approvers, and set resources.

You can set tollgates to be effort-based or duration based:

▶ Effort-based

This is based on the effort required to get a job done. For example, a paint job may require 40 hours for 4 people working for 5 hours every day to complete the job.

▶ Duration-based

If there is a required time for the job to be completed. For example, in the instance of the paint job above, it may take a certain amount of time for the paint job to dry up. The lead time cannot be reduced by putting more people to dry the paint.

Activity templates are used in roadmaps and changes made to an activity template affect all roadmaps that refer to the template. Existing projects are not affected, only future projects are affected by the template changes.

In This Section

Creating Activity Templates

To create a new activity template:

1) Click the **Application Configuration** tab.

2) Select the **Activity Templates** link.

3) Click the **Create a New Activity Template** button. The *Create Activity Template* page is displayed.

4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the Initiative pull-down menu.

5) Based on the initiative, the Roadmap family pull-down will be populated. Choose the appropriate roadmap family for your new activity template.

6) Select the activity type for which this template is being created.

7) Select the Activity Sub Type for this activity template.

8) Enter a name for the activity template. This name will be used within the system and will not be visible to any user other than the administrator.

9) From the drop-down list select if this activity template will be used as a **template** or as **creation_defaults**. You can choose to use this as a template for creating activities on roadmaps, or as creation_defaults. Creation_defaults are used to set default field values so new activities on the Roadmap appear as in-line rows.

10) You can also enter a description and the estimated time duration (in days) for this activity. This will be the default duration for this particular activity in every project that uses this activity template.

11) Select a default Labor Expense Type (LET) from the drop-down list.

12) From the drop-down menu select the Plan Effort Type and Actual Effort Type.

13) Select if you want to enforce resources. If you select **Yes**, then select the mandatory resources. You can also the select if all resources are required for this activity type.

14) From the *Approvers* pane, you can manage permissions for the approvers and you can also choose to enforce approvals and approvers for the activity template.

15) From the *Percentage Completion* pane, you can select how you want the percentage complete to be calculated.

16) Click **Create** to save your changes.

Editing Activity Templates

Editing an activity template consists of modifying its name, description and time duration.

To edit an existing activity template:

1) Click the **Application Configuration** tab.

2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.

3) Locate the template you want to edit and click the **[Edit]** link in the Action column.

4) Make the necessary changes in the *Edit Activity Template* page.

5) Click **Update** to save your changes.

Copying Activity Templates

If you want to create multiple activity templates that are only slightly different from each other, you can use the copy function. After you are done copying the new activity template, you can modify the deliverables and tasks. See topic *Editing Activities and Tasks* (on page 62).

To copy an existing activity template:

1) Click the **Application Configuration** tab.

2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.

3) Locate the template you want to copy and click the **[Copy]** link in the Action column.

4) Enter a name.

5) Click **Copy**. A complete copy of the activity template is created.

Deleting Activity Templates

To delete an existing activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link. You will see a list of all the existing activity templates.
3) Locate the template you want to delete and click the **[Delete]** link in the **Action** column.
4) Click **OK** in the pop-up dialog box to confirm the deletion.

Adding Deliverables and Tasks to Activity Templates

For an activity template to be meaningful, each activity must have its own set of deliverables, which can be broken down further into tasks. Since EnterpriseTrack allows you to create multiple activity templates for an activity, you can define deliverables and tasks for each activity template.

Adding deliverables and tasks

Once the template has been created, you can continue to add the deliverables and tasks.

To add deliverables and tasks to an activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of all the existing activity templates.
3) Locate the template and click on its name. The *Activity Template Explorer* page is displayed.
4) Click the ⊞ icon to view the contents of the template.
5) Add peer or child activities.

   a. Click the �· icon to add a peer activity. You can add gates, tollgates, deliverables, phases, and tasks to the activity template.

   b. Click the �· icon to add a child activity. You can add gates, tollgates, deliverables, phases, and tasks to the activity template.

   > **Note:** You cannot add peer activities to a top level activity. However, you can add child or peer level activities to a child activity.

6) Enter a name, sub type and description for this activity.
7) You can enter the number of estimated hours for this activity and this will be carried forward when the roadmap is used for a project. Projects Managers can check the available hours for each user and make sure it is in line with the estimated hours for an activity before assigning the deliverable.
8) Set the initial status, select which roles will be allowed to own this activity, and whether ownership should be enforced or not.
9) You can also choose tools that are associated with this activity. The system allows you to enter the names of tools that have not yet been uploaded into the Knowledge Base under **Tool Templates**. Click the **Add** link next to the **All Available Tools** field and enter a name in the pop-up dialog box.

> **Note:** You must upload this tool in the Knowledge Base.

10) Click the **Save** button to save your changes.

Adding Dependencies between Activities

To add dependencies between activities:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of all the existing activity templates.
3) Locate the template and click on its name. The *Activity Template Explorer* page is displayed.
4) Select an activity. The *Details* pane is displayed.
5) Select the **Dependencies** tab.
6) Click the **Add New** icon.
7) Add a predecessor by entering the activity name. You can also click the **View** link to find the dependent activity.
8) Enter the type of dependency. Choose from **Start to Start**, **Start to Finish**, **Finish to Finish**, or **Finish to Start**. The start date is computed from the completion date of the predecessor tasks and the completion date is calculated from the start date and the duration of the predecessor activity.
9) Click **Save**.

> **Note**: The Dependencies tab is displayed only if the initiative of the activity template has the *Enable Activity Level Dependencies* feature enabled, and the Activity type has Dependencies enabled.

Editing Activities and Tasks

To edit activities and tasks on an activity template:

1) Click the **Application Configuration** tab.
2) Click the **Activity Templates** link to view a list of existing activities templates.
3) Locate the template you want to edit and click on the name of the activity template. The *Activity Template Explorer* page is displayed.
4) Click the ⊞ icon to view the contents of the activity template.
5) Click on the name of the deliverable or task you want to modify.
6) Make the necessary changes.
7) Click **Update** to save the changes.

Working with Roadmaps

Project Managers can use these pre-determined roadmaps to quickly create projects. Roadmaps are made up of activity templates, which in turn are made up of deliverables that are broken down into tasks.

In This Section

Creating Roadmaps

To create a new roadmap:

1) Click the **Application Configuration** tab.

2) Select the **Roadmaps** link. The *Roadmap List* page is displayed.

3) Click the **Create New Roadmap** button.

4) Select an initiative.

5) Enter a name for the roadmap. This name is used within the system and is not visible to any user other than the administrator.

6) Select an activity template from the *Mandatory Activity Template* pull-down menu. All roadmaps must have at least one activity template.

7) Enter the Mandatory Realization Activity Template.

8) Enter other relevant information pertaining to this roadmap. See table below for a description of these fields.

9) Click **Create Roadmap**.

Field	Description
Roadmap Family	The options you can choose are based on the initiative you selected.
Is Phase Gated Roadmap?	Select **Yes** if you want each phase on the roadmap to be completed before starting the next phase.
Show Stages as Tabs?	Select **Yes** to have top-level activities appear as separate tabs on the Project Roadmap page. Select **No** to have all the top-level activities appear on the same tab.
Enable WBS Code on Activity	Select **Yes** if you want to the WBS to have a hierarchical numbering structure, for example 1, 1.1, 1.1.1, etc. for activities displayed on a project roadmap.
Allow Template Generated Activities to	Select **Yes** if you want users to modify or delete the name of a template generated activity. Other attributes within the

be Modified?	template can also be modified.
Scheduling Mode	Select **Manual** or **Semi-Automatic** **Manual**: EnterpriseTrack does not update the dates on the project roadmap when dependent activities are rescheduled or modified. When dependent activities are rescheduled, you have to manually update the activity dates on the Project Roadmap page. **Semi-Automatic**: EnterpriseTrack updates the dates when dependent activities are rescheduled. When dependent activities are rescheduled, you can click the **Schedule** button on the Project Roadmap page for EnterpriseTrack to update the activity dates.
Resource Required to Complete Activities at Top Level?	Select **Yes** if you require resources to be assigned to top-level activities in order to close them. Select **No** if you do not require a resource to be assigned to top-level activities. Select **Activity Type Specific** if you want this value to be the same as the Activity Type setting.
Resource Required to Complete Activities at Other Level?	Select **Yes** if you require resources to be assigned to activities at other levels in order to close them. Select **No** if you require no resource to be assigned. Select **Activity Type Specific** if you want this value to be the same as the Activity Type setting.
Allowed Activity Types at Other Levels	Choose the Activity Types allowed at other levels.
Activity Type to Creation-Default Mappings	If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows.
Is MSP Integration Allowed?	Select **Yes** if you want to allow MSP (Microsoft Project) integration. You must select a template file before you can export or import data. Click the **Browse** button and select a template.
Computation mode for dates and duration	**Internal**: EnterpriseTrack computes the dates and duration. **External read-only**: The calculation for dates and duration comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for dates and duration comes from MS Project. Project Managers can change the values in EnterpriseTrack.

Computation mode for duration and efforts	**Internal**: EnterpriseTrack computes the duration and effort. **External read-only**: The calculation for duration and effort comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for duration and effort comes from MS Project. Project Managers can change the values in EnterpriseTrack.
Computation mode for efforts and cost	**Internal**: EnterpriseTrack computes the effort and cost. **External read-only**: The calculation for effort and cost comes from MS Project. Project Managers cannot edit the values in EnterpriseTrack. **External read-write**: The calculation for effort and cost comes from MS Project. Project Managers can change the values in EnterpriseTrack.

Editing Roadmaps

To edit a roadmap:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to edit and click the **[Edit] link in the Action** column.
4) Make the necessary changes.
5) Click **Update** to save your changes.

Copying Roadmaps

If you want to create multiple roadmaps that are only slightly different from each other, you can use the copy function. When you have finished creating a new roadmap, you can modify its activity template. See topic *Adding Activity Templates to a Roadmap* (on page 66).

To copy an existing roadmap:

1) Click the **Application Configuration** tab.
2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.
3) Locate the roadmap you want to copy and click the **[Copy]** link in the **Action** column.
4) Enter a name, and click **Copy**. A complete copy of the roadmap is created.
5) Locate the new roadmap and go on to modify its activity templates by clicking on the name of the roadmap.

Deleting Roadmaps

To delete an existing roadmap:

1) Click the **Application Configuration** tab.

2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.

3) Locate the roadmap you want to delete and click the **[Delete]** link in the **Action** column.

4) Click **Ok** in the pop-up dialog box to confirm the deletion.

Changing Status

To edit the status of a roadmap:

1) Click the **Application Configuration** tab.

2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.

3) Locate the roadmap you want to edit and click the **[Change]** link in the *Status* column.

4) Change the status of the roadmap. Select **Invalid** if you do not want users to use obsolete roadmaps when creating or editing projects. You cannot create, or edit the roadmap if the status is *Invalid*. If the status is **Valid**, users can use this roadmap. If you select **Archived**, the roadmap cannot be used while creating projects but can be used to edit or filter.

5) Click **Update** to save your changes.

> **Note:** In read-only pages, the Archived roadmaps are suffixed with ^ and Invalid roadmaps are marked with x. While creating projects only valid roadmaps are displayed and while editing, the current roadmap is displayed, but only valid roadmaps are displayed in the drop down option. Archived roadmaps do not cause any validation errors.

Adding Activity Templates to a Roadmap

To add activity templates to a roadmap,

1) Click the **Application Configuration** tab.

2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.

3) Locate the roadmap to which you want to add an activity template.

4) Click on its name. You will see all the activities that are currently part of the roadmap.

5) Click the **Add Activity Template** button.

6) Select the activity templates you want to add from the **Activity Templates** pull-down menu.

7) Enter the Order ID for this new activity to tell the system where it should be located in the roadmap. You can click the **Existing Order IDs** link to view the existing list before entering a number in this field.

8) Click **Add Activity Template**.

Editing MS Project Import and Export

To edit a roadmap to allow MS Project import/export:

1) Click the **Application Configuration** tab.

2) Click the **Roadmaps** link. The *Roadmap List* page is displayed.

3) Locate the roadmap you want and click the **[MS Project]** link in the **Action** column.

4) Select **Yes** if you want to allow MS Project integration.

5) Click the **Browse** button to select a MS Project template file (. mpt).

6) Click **Update.**

Working with Non-WBS roadmaps

In This Section

Creating a Non-WBS Roadmap

You can define a list of activities that are outside of the project roadmap. These activities are defined as non-WBS activities. This may be a list of change requests, discussions, risks, etc. These activities are not tied to the project roadmap, but are associated with a project and are displayed on the Left Navigation Bar.

To create a non-WBS roadmap:

1) Click the **Application Configuration** tab.

2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.

3) Click the **Create a New Non-WBS Roadmap** button.

4) Select an initiative from the drop-down list.

5) Based on the initiative, the **Roadmap family** pull-down will be populated. Choose the appropriate roadmap family.

6) Enter a name for this roadmap.

7) Click the **Change** button and select an icon for this roadmap. This icon will be displayed in Left Navigation Bar.

8) Enter a left navigation menu name for this roadmap.

9) Choose if you want to enable WBS code on activity.

10) Select an Activity Type for this roadmap.

11) If activity type to creation default mapping exists, you can select it from the pull-down menu. This mapping allows you to set default field values for roadmap activities so new activities appear on the roadmap as in-line rows. For more information, see *Creating Activity Templates* (on page 59).

12) Click the **Create Non-WBS Roadmap** button.

Managing Non-WBS Roadmaps

Editing a Non-WBS Roadmap

To edit a non-WBS roadmap:

1) Click the **Application Configuration** tab.

2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.

3) Click the **[Edit]** link next to the roadmap you want to edit.

4) Click **Update** after you have made changes to roadmap.

Deleting a Non-WBS Roadmap

To delete a non-WBS roadmap:

1) Click the **Application Configuration** tab.

2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.

3) Click the **[Delete]** link next to the roadmap you want to delete.

4) Click **OK** to confirm the deletion.

Changing the Status

To change the status of a non-WBS roadmap:

1) Click the **Application Configuration** tab.

2) Select **Non-WBS Roadmaps** link. The *Non-WBS Roadmap List* screen is displayed.

3) Select a roadmap and click the **[Change]** link under the *Status* column.

4) Choose a status (**Valid**, **Invalid**, or **Archived**) for this roadmap.

5) Click **Update** to save your changes.

Working with Dependency Types

To view the current dependency types:

1) Click the **Application Configuration** tab.

2) Select the **Dependency Types** link. A list of all dependency types is displayed.

Editing Dependency Types

To edit dependency types:

1) Click the **Application Configuration** tab.

2) Select the **Dependency Types** link. You will see a list of all the existing dependency types.

3) Click the **Edit** link associated with the dependency type you want to modify. The *Edit Dependency Types* page is displayed.

4) Enter the new Dependency Type Name and the Dependency Type Code.

5) Click the **Update** button to make the changes.

> **Note:** There are four different predecessor types. You can change the default display name at the initiative level.

Working with Project Types

Project types are a way of classifying projects for reporting purposes. A project type may be associated with one or more roadmaps. For example, you may have a project type called Baseline associated with DMAIC and DMADV roadmaps, and another project type called Just Do It associated with the DMAIC-Short and DMADV roadmaps.

Adding a Project Type

To create a new project type:

1) Click the **Application Configuration** tab.
2) Click the **Project Type** link. You will see a list of all the existing project types.
3) Click the **Create New Project Type** button. The *Pulldown Values for Project Type* page is displayed.
4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the **Initiative** pull-down menu.
5) Enter a name for the roadmap. This name will be used within the system and will not be visible to any user other than the administrator.
6) Based on the initiative, the Roadmap family pull-down will be populated. Choose the appropriate roadmap family for your new project type.
7) Select the roadmaps that are to be associated with this project type. Hold down the **Control** key and click to select multiple values.
8) Click **Create** to save the new project type.

Editing a Project Type

To edit a project type:

1) Click the **Application Configuration** tab.
2) Click the **Project Type** link. You will see a list of all the existing project types.
3) Click the name of the project type to be edited.
4) Make the required changes and click **Update** to save your changes.

Working with Resource Assignment Types

Resource Assignment allows you to manage responsibility charting. You can identify functional areas, key activities, and decision points by defining roles and responsibilities. There are four different types of resource types (RACI) that you can assign in a project:

▶ Accountable (A): Individual who is ultimately responsible for a project with a yes/no authority. One function can have only one accountable person.
▶ Responsible (R): Individual working on the activity and responsible for action and execution of the plan.
▶ Consult (C): Individual who must be consulted prior to a final decision or action. This involves a two-way communication.
▶ Inform (I): Individual that needs to know of the decision or action. This is usually a one-way communication.

Adding a Resource Assignment Type

To create a new resource assignment type:

1) Click the **Application Configuration** tab.

2) Select the **Resource Assignment Types/ RACI** link. You will see a list of all the existing resource assignment types.

3) Click the **Create New Assignment Type** button. The *Create Resource Assignment Type* page is displayed.

4) In installations that have multiple initiatives configured within the same system, select the appropriate initiative from the Initiative pull-down menu.

5) Enter a name and a short name for the new assignment type.

6) Select **Yes** to enable this assignment type.

7) Select **Yes** to add this type towards project finance calculation.

   If **Consider for Project Finances** setting is **Yes**, then AET effort flows to finances. If set to **No**, then users assigned with this assignment type will not have their effort on the activity monetized into the project finances

8) Enter the Sort Order for this new assignment type. You can click the **Order of Existing Types** link to view the existing list before entering a number in this field.

9) Click **Save**.

Editing a Resource Assignment Type

To edit an existing resource assignment type:

1) Click the **Application Configuration** tab.

2) Select the **Resource Assignment Types/ RACI** link. You will see a list of all the existing resource assignment types.

3) Click the **Edit** link associated with the resource assignment type you want to modify. The *Edit Resource Assignment Type* page is displayed.

4) Make the required changes and click **Update** to save your changes.

Configuring Status Indicator

You must configure and manage the status indicators displayed in the Tree pane within the Strategy section of EnterpriseTrack. You can create multiple status indicator lists. Each status indicator list can have a number of items, each with its own color and value assigned to it. You can also choose to have the indicator icon blink.

Creating a Status Indicator

To create a new status indicator:

1) Click the **Application Configuration** tab.

2) Select the **Status Indicator** link.

3) Click the **Create a New Status Indicator** button.

4) Add items as required and specify the color and value for each one

5) Click the **Add Status Indicator** button to add this configuration to the list of status indicators in the system.

Project Settings

In This Section

Configuring Percentage Completion

Use the *Percent Completion Type* page to select how EnterpriseTrack should calculate the percentage complete for projects. For each initiative defined in your system, you can select a default from the following choices:

▶ **Manual Mode**: Users can manually enter a number from the Project Basics page.

▶ **Effort-based (Actual vs Planned Effort for Immediate Children)**: Percentage complete is calculated based on the actual effort and the planned effort of all top-level tasks.

▶ **Effort-based (Actual vs Planned Effort for All Children)**: Percentage complete is calculated based on the actual effort and the planned effort of all tasks.

▶ **Effort-based (Planned Completed vs Total Planned Effort for Immediate Children)**: Percentage complete is calculated based on the planned completed effort and the planned effort of all top-level tasks.

▶ **Effort-based (Planned Completed vs Total Planned Effort for All Children)**: Percentage complete is calculated based on the planned completed effort and the planned effort of all tasks.

▶ **Duration-based (Actual vs Planned Duration for Immediate Children)**: Percentage complete is calculated based on the actual duration and the planned duration of all top-level tasks.

▶ **Duration-based (Actual vs Planned Duration for All Children)**: Percentage complete is calculated based on the actual duration and the planned duration of all tasks.

▶ **Duration-based (Planned Completed vs Total Planned Duration for Immediate Children)**: Percentage complete is calculated based on the planned completed duration and the planned duration of all top-level tasks.

▶ **Duration-based (Planned Completed vs Total Planned Duration for All Children)**: Percentage complete is calculated based on the planned completed duration and the planned duration of all tasks.

▶ **Count-based (Completed vs Total Count for Immediate Children)**: Percentage complete is calculated based on the number of completed tasks and the total number of top-level tasks.

▶ **Count-based (Completed vs Total Count for All Children)**: Percentage complete is calculated based on the number of completed tasks and the total number of all tasks.

To configure the percent completion type:

1) Click the **Application Configuration** tab.
2) Select the **Percent Completion Type** link.
3) Click the **[Edit]** link next to your initiative.
4) From the drop-down menu, select the percent completion type.
5) Click **Update** to save your changes.

Auto Close Parent Activity

Use the *Auto Close Parent Activity* page to automatically close parent activities when all tasks and deliverables associated with the parent activity are complete. For each initiative you can choose to auto close parent activities.

If you select **Yes**, then the parent activity is automatically closed when the last deliverable in current phase is marked complete. The project phases automatically advance till the project is in the last phase. After all deliverables in the last phase are closed, the last phase remains open till the Project Lead or a user with project close permission clicks on the **Close Project** button and closes the project.

If you select **No**, you must manually close each phase to move to the next phase.

To modify the auto-close feature:

1) Click the **Application Configuration** tab.
2) Select the **Auto Close Parent Activity** link.
3) Click the **[Edit]** link next to your initiative.
4) Select **Yes** or **No**.
5) Click the **Update** button to save your changes.

Official Phase Start and Close Defaults

Use the *Official Phase Start and Close Defaults* page to choose how you want the phase start date and the phase close date to be calculated.

To set the official phase start and close defaults:

1) Click the **Application Configuration** tab.
2) Select the **Official Phase Start and Close Defaults** link.
3) Click the **[Edit]** link next to default you want to change.
4) Make your selection.
5) Click the **Update** button to save your changes.

Manage Detail Section Display Preference

You can set how you want the detail section to display. You can choose to have it in the main page, as a pop-up or as a split pane.

To modify the detail section display mode:

1) Click the **Application Configuration** tab.

2) Select the **Detail Section Display Preference** link.
3) Click the **[Edit]** link next to the initiative.
4) From the pull-down menu select from **Split Pane Screen**, **Pop-up Screen**, or **Main Screen**.
5) Click the **Update** button to save your changes.

Specify Levels to Pre-fill

Use the *Specify Levels to Pre-fill* page to select the organizational levels you want to pre-populate. The levels are pre-filled in the Ideas, Proposals, and Projects pages based on the profile of the user that is logged in.

To choose a level:

1) Click the **Application Configuration** tab.
2) Select the **Org Levels to Pre-fill** link.
3) Click the **Edit** link next to your initiative.
4) Specify a level from the drop-down menu.
5) Click **Update**.

Manage Project Cycle Time Mode

To manage the project cycle time mode:

1) Click the **Application Configuration** tab.
2) Select the **Project Cycle Time Mode** link.
3) Click the **[Edit]** link next to the initiative.
4) From the pull-down menu select from **Compute Cycle Time from Project Duration**, or **Compute Cycle Time from Summation of Cycle Times of Top Level Activities**.
5) Click the **Update** button to save your changes.

Set Minimum Slacks for Critical Path

Slack is the amount of time a task can be delayed without impacting the start date of a subsequent task. Use the **Minimum Slack for Critical Path** link to enter the minimum slack (in days) after which a task will be on the critical path.

To set the minimum slack:

1) Click the **Application Configuration** tab.
2) Click **Minimum Slack for Critical Path**.
3) Enter the minimum slack.
4) Click **Update**.

Configuring Organizational Hierarchy

Oracle recommends that you create an organizational hierarchy to ensure that all your resources, ideas, proposals and projects are associated with appropriate units within your organization. You can specify five levels in your organization hierarchy; the first two levels are always displayed, the other three are displayed only if it was set up during the initial configuration of your system. Your system may be configured to require you to enter values for each of the five levels.

The default levels, hierarchies and the dependencies between the levels are created during the initial configuration of the system. A sample system might contain the following levels:

1) Division
2) Business Unit
3) Business Sub-unit
4) Location
5) Regions

You can add, edit, and delete values within each level using the links under **Organization Hierarchy**.

In This Section

Adding New Values

To add new values to each level of your organization hierarchy:

1) Select the **Application Configuration** tab.
2) Select a level from the Organizational Hierarchy section. For example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click **Create a New Division**. The name of this button is based on the level you selected in the previous step.
4) Select the **Bulk Insert** checkbox to add multiple values at the same time.
5) Enter a name.
6) Enter a charge back code. This field is optional.
7) Click **Create**.

Editing Existing Values

You can change the name, charge back code, and status of any of the existing values. You can modify the status of any of the five levels of your organization hierarchy to:

▶ **Valid**: Users can use this level when adding or editing resources, ideas, proposals, or projects.

▶ **Invalid**: Users cannot use this level.

▶ **Archived**: Users can use this level when editing or filtering existing resources, ideas, proposals or projects. The historic value is preserved but it cannot be used when creating new projects.

Changing the status on one level of the hierarchy can indirectly affect the other four levels. For example, if you mark BU1 as Archived and Europe is Invalid then the overall relationship status for:

▶ Division1 → BU2 → Asia → China → Shanghai is Valid.

▶ Division1 → BU1^→ Asia → China → Shanghai is Archived.

▶ Division1 → BU1^→ Europe ˣ→ England → London is Invalid.

In read-only pages, the archived hierarchies are suffixed with ^ and invalid hierarchies are marked with an ˣ. When creating new projects only valid hierarchies are displayed in the drop-down option. When editing existing projects, the current hierarchy is displayed and only valid hierarchies are displayed in the drop-down option. Archived hierarchies do not cause any validation errors.

To edit the existing values for each level of your organization hierarchy:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click the **Create a New Division** button. The name of this button varies based on the level you selected in the previous step.
4) Locate the value you want to edit and click the **[Edit]** link.
5) Modify the name, charge back code, or status.
6) Click the **Update** button.

Deleting Values

To delete existing values in your organizational hierarchy:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**. The names of these levels may vary depending on your configuration. A list of values for the level you selected displays.
3) Click the **[Delete]** link next to value you want to delete.
4) Click **OK** to confirm the deletion.

> **Note:** Deleted values are not available anywhere in the system. If there are hierarchies and dependencies, you must first resolve these before deleting the values.

Reassigning Relationships

You can reassign all resources, ideas, proposals, and projects belonging to one Business Unit to another Business Unit within your organization hierarchy.

To reassign relationships:

1) Select the **Application Configuration** tab.
2) Select the appropriate level from the Organizational Hierarchy section, for example **Division**, **Business Unit**, **Business Subunit**, **Location**, or **Regions**. The names of these levels may vary depending on your configuration.
3) Click the **[Reassign]** link next to the Business Unit you want to reassign.
4) Select a new Business Unit from the drop-down menu.
5) Click **Reassign**.

Creating Hierarchical Relationships

You can create and manage the relationships between the levels in your organization hierarchy. For example, you could create a hierarchical relationship between Division, Business unit and Location. You cannot edit these relationships, but you can delete and create new relationships.

> **Note:** The options you see are set during the initial configuration of your system.

To create a new hierarchical relationship:

1) Select the **Application Configuration** tab.
2) Click the **Hierarchical Relationships** link.
3) Click the **Create new Hierarchical Relationship** button.
4) Enter a name.
5) Click to select the combination of levels you want to include in this hierarchical relationship.
6) Click **Create**.

Configuring Status Reports

In This Section

Managing Status Reports

You can use the *Manage Status Report* page to configure status reports. You can choose the sections you want displayed, change the section names, change the name of the submit button, and also set the frequency of status reports

To manage status reports:

1) Select the **Application Configuration** tab.

2) Click the **Status Reports** link. The *Manage Status Report* page is displayed.

3) Select the status report you want to edit.

4) On the Status Report Configuration section:

   a. Enter a display name for the following: Submit Button, Key Section, Finance Section, Project Team Section, Date Section, Notes Section, Reports Sections, Issues Section, and Risks Section. Select the **Display** checkbox to have it display on status reports.

   b. Select the frequency (Weekly, Monthly, or Yearly) you want status reports to be created.

5) On the Team Member Filter section, select the resource status, roles, and the activity status you want displayed on the status report.

6) On the Issues Filter section, select the status, priority, and severity of issues you want displayed on the status reports.

7) On the Reports Filter section, select the Status, priority, and severity of issues you want displayed on the status reports.

8) Click the **Save**.

Configuring Custom Sections for Project Status Report

EnterpriseTrack allows users to complete and submit status reports for each project. Some of the fields included in the status report are pre-defined within the system, but as an Administrator, you can specify additional fields that should be part of the weekly status reports. These additional fields are added as text boxes to the status report.

To create and manage project related status reports sections:

1) Select the **Application Configuration** tab.

2) Click the **Status Report Sections** link. All the available sections are listed.

3) To modify an existing section, click the **Edit** link.

4) To create a new section, click the **Create New Section** button.

5) To delete an existing section, click the **Delete** link.

Managing Key Statuses

You can use the *Key Statuses* page to set status descriptions for the keys. For each initiative, you can create multiple statuses. For example, you can create a status called *On Time*, or *Red*, or any numeric value that describes the status of keys.

To create a status for keys:

1) Select the **Application Configuration** tab.
2) Click the **Key Statuses** link.
3) Click the **Add a New Key Status** button.
4) Enter a description of the status.
5) Select if you require users to add an explanation for this status.
6) Click **Update**.

To manage statuses:

1) Select the **Application Configuration** tab.
2) Click the **Key Statuses** link.
3) To edit the status:
4) Click the **[Edit]** link next to the status you want to edit.
5) Make the necessary changes and click the Update button
6) To delete a status:
7) Click the **[Delete]** link next to the status you want to delete.
8) Click OK to confirm the deletion.

Managing Keys

You can use the *Status Report Keys* page to create and manage keys that appear on status reports. For each initiative, you can configure multiple keys. For example, you can create a key called *Time* or *Budget*.

To create a key:

1) Select the **Application Configuration** tab.
2) Click the **Keys** link. The *Status Report Keys* page is displayed.
3) Click the **Add a New Status Report Key** button. The *Create Status Report Key* page is displayed.
4) Select an initiative from the drop-down menu.
5) Enter a name for this key. If you enter Red, Yellow, or Green, the status indicators displayed on status reports will display in the corresponding color.
6) Select if you want this to be an aggregate key.
7) Enter an order ID. This determines where it is displayed in status reports.

8) Click **Create**.

To manage keys:

1) Select the **Application Configuration** tab.
2) Click the **Keys** link.
3) To edit the status:
   a. Click the **[Edit]** link next to the key you want to edit.
   b. Make the necessary changes and click the **Update** button
4) To delete a status:
   a. Click the **[Delete]** link next to the key you want to delete.
   b. Click **OK** to confirm the deletion.

Calendars

In This Section

Managing Calendars

The *Calendars* section allows you to manage calendars by editing a calendar, copying a calendar, viewing calendar usage, and viewing the exception list of a selected calendar. You can also create a new calendar from this section, see topic ***Creating a New Calendar*** (on page 80).

Edit a Calendar

To edit a calendar, follow the steps below:

1) Click the **Application Configuration** tab.
2) Select the **Calendars** link. The main *Calendars* page is displayed.
3) Click the **View** link next to the calendar you want to edit. The *Manage Calendars* page is displayed.
4) You can edit the calendar by making changes to the number of working days, the number of working hours, or by adding/deleting exceptions.
5) To delete an exception, click on a date to select it. The *Manage Exception* pop-up window is displayed. Click **Delete**.
6) Click **Save** to save this calendar, or click **Save and Close** to save and return the main *Calendar* page.

Copy a Calendar

To copy an existing calendar, follow the steps below:

1) Click the **Application Configuration** tab.

2) Select the **Calendars** link. The main *Calendars* page is displayed.

3) Click the **Edit** link next to the calendar you want to copy. The *Manage Calendars* page is displayed.

4) Click the **Copy** button on the top right corner of the screen.

5) A pop-up window is displayed. Enter a name for this copy.

6) Select if you want to copy the exceptions.

7) Click **OK**.

View Usage

To view the calendar usage, do the following:

1) Click the **Application Configuration** tab.

2) Select the **Calendars** link. The main *Calendars* page is displayed.

3) Click the **Edit** link next to the calendar you want to view. The *Manage Calendars* page is displayed.

4) Click the **View Usage** button on the top right corner of the screen. A list of projects and proposals that use this calendar are displayed.

View Exceptions List

To view the exception list of a calendar, do the following:

1) Click the **Application Configuration** tab.

2) Select the **Calendars** link. The main *Calendars* page is displayed.

3) Click the **Edit** link next to the calendar you want to view. The *Manage Calendars* page is displayed.

4) From the *Exceptions List* tab on the bottom of screen, click the calendar icons to select a *From date* and *To date*.

5) Click **Apply** to view all exceptions in the selected date range. You can click the **Reset** button to reset to a selected month.

Creating a New Calendar

To create a new calendar for your organization, follow the steps below:

1) Click the **Application Configuration** tab.

2) Select the **Calendars** link. The main *Calendars* page is displayed.

3) Click the **Create** button.

4) A pop-up window is displayed. Enter a name for your calendar and click **OK**. The *Manage Calendars page* is displayed.

5) Enter the number of working hours per day.

6) Choose the status **Valid**, **Invalid**, or **Archived**.

7) Select **Yes** you want this to be the default calendar.

8) Click to select the working days. From the calendar you can click the tab for each month and year. Click on any date to set an exception. The *Manage Exceptions* pop-up window displays. Enter the name for the exception and choose if you want it to be considered a working day or a non-working day. Click **Save**.

9) Click **Save** to save this calendar, or click **Save and Close** to save and return the main *Calendar* page.

Managing Calendar Field

Use the **Manage Calendar Field** link to set a default calendar to use for each initiative configured in your system. You can also choose to allow users to change the type of calendar they want to use when they create or update a project or proposal.

To manage the calendar field:

1) Click the **Application Configuration** tab.
2) Click the **Calendar Field** link. The **Manage Calendar Field** page is displayed.
3) Click the **[Edit]** link next to your initiative.
4) For the field **Allow Calendar to be Updated on Proposal or Project Creation?**, select **Yes** if you want to allow users to change the default calendar. Select **No**, if you want users to only use the default calendar.
5) Click **Update**.

Routing

In This Section

Configuring Idea Routing

EnterpriseTrack allows users to quickly create new ideas and convert them into proposals and projects. To ensure that the appropriate users get to view idea before they are assigned to an owner, the system allows the administrator to create an idea routing scheme.

When a user creates a new idea, it can automatically be routed to an "Idea router" or "Idea Assigner". This individual will have the responsibility to review the idea and assign it to an "Idea Owner" or "Idea Assignee".
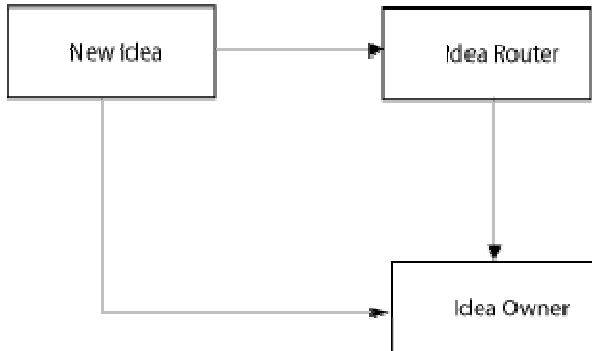
This functionality becomes infinitely more useful with the ability to create multiple routing schemes based on your organizational hierarchy. You can create one global routing scheme and then create specific routing schemes for each of your departments.   The routing scheme based on the units of the organizational hierarchy will override the global settings.

For example, let us assume that the global settings specify an Idea Router, but routing scheme for the Denver, CO division in the Finance department has a routing scheme that allows ideas to be routed directly to an Idea Owner. When a member of the Denver, CO division in the Finance department creates an idea, it will get routed directly to the idea owner. All other ideas will get routed to the global default Idea Router.

Create Idea Routing

> **Important!**
>
> Ensure that you have created users who will be Idea Routers and Idea Owners before proceeding with the creation of a new idea routing.

To create a new idea routing scheme:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes.
3) Click the **Create a New Idea Routing** button.
4) Select the appropriate organizational units for which this idea routing scheme will be applicable from the pull-down menus.
5) Select whether you want the idea to be routed to an Idea Router or directly to an Idea Owner.
6) Select the user who will fulfill the position you chose in the previous step.
7) Enter an Order ID for this idea routing. This will determine the order in which the idea routing rules are evaluated. The Order ID should be less than the default global routing scheme. You can click the **View Existing Order IDs** link to view the existing list before entering a number in this field.
8) Click **Create** to save the new idea routing scheme.

Editing Idea Routing

To edit an idea routing:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes. Locate the idea routing you want to edit and click the **[Edit]** link in the *Action* column.
3) Make the required changes.
4) Click **Update** the save the changes.

Deleting Idea Routing

The Global idea routing cannot be deleted. To delete one of the other idea routings:

1) Click the **Application Configuration** tab.
2) Click the **Idea Routing** link. You will see a list of all the existing idea routing schemes.
3) Locate the idea routing you want to delete and click the **[Delete]** link in the *Action* column.
4) You may be required to confirm the delete action.
5) Click **Ok** to delete the selected idea routing.

Configuring Approver Routing

Create New Approver Routing

To create a new approver routing scheme, do the following:

1) Click the **Application Configuration** tab.
2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.
3) Click the **Create New Approver Routing button** to display the Create Approval Routing page.
4) From the pull-down menus, select the Initiative, Division, Business Unit, Location, Regions, Role and Approver.
5) Enter an Order ID for this approval routing. This will determine the order in which the approval routing rules are evaluated. The Order ID should be less than the default global routing scheme. You can click the **View Existing Order IDs** link to view the existing list before entering a number in this field.
6) Click **Create** to create a new approver routing scheme. Click **Cancel** to leave the page without saving your changes.

Edit Approver Routing

To edit approver routing scheme, do the following:

1) Click the **Application Configuration** tab.
2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.

3) Locate the approver routing you want to edit and click the **Edit** link in the Action column.

4) On the **Edit Approval Routing** page make the required changes.

5) Click **Update** the save the changes. Click **Cancel** to leave the page without saving your changes.

Delete Approver Routing

1) Click the **Application Configuration** tab.

2) Click the **Approver Routing** link. You will see a list of all the existing approval routing schemes.

3) Locate the approver routing you want to delete and click the **Delete** link in the Action column.

4) You may be required to confirm the delete action.

5) Click **Ok** to delete the selected approver routing. Click **Cancel** to retain the approver routing in the system.

Configuring Custom fields

In This Section

Editing Pre-defined Custom Fields

Pre-defined custom fields are created during the initial configuration your system. You cannot create new fields or delete existing fields. As an application administrator, you can only edit the existing fields.

To edit the pre-defined custom fields:

1) Click the **Application Configuration** tab.

2) Click the **Custom Fields** link. The *Manage Custom Fields* page is displayed. The fields are organized by section e.g., Ideas, Proposal, Project, Program and Resource.

3) Click the link associated with the section you want to edit, for example *Manage Custom Fields for Ideas*. The *Manage Custom Field for Ideas* page is displayed. You can use the **Set Quick Filters for Custom Fields** to select if you want to only display fields that are set to visible.

4) Click the **[Edit]** link next to the field you want to modify.

5) You can edit the following fields:

   ▸ **Field Name**: The name for this custom field.

   ▸ **UI Section:** Select the section within which this custom field should display. For example, you can choose to display a project custom field under Basics, Classification, or Organization. This option is applicable only if you are configuring custom fields for Ideas, Proposals, Projects, or Programs.

   ▸ **Visible**: Select **Yes**, if this custom field should be visible to users.

> ‣ **Display on List Pages**: Select **Yes** if you want this custom field to appear on List pages.

> ‣ **Display in Filters**: Select **Yes** if want this custom field to display as an option in the Filter dialog box.

> ‣ **Possible Values**: Enter the possible values for this custom field.

> ‣ **Sort Possible Values Alphabetically**: Select **Yes** if you want the possible values alphabetically sorted when displayed in the UI.

> ‣ **Tool Tip**: Enter help text. The text you enter is displayed next to the custom field. Users can mouse over the **Information** icon to view the help text.

> ‣ **Update Status and Order of Possible Values**: For each value select **Valid**, **Invalid,** or **Archived**. Values that are marked **Valid** are displayed in the UI as valid field options; invalid field values are not displayed in the system and cannot be used. Archived field values are maintained in the system, but are not displayed as valid field options. You can also enter a sort order for each value. This order determines the order in which these values are displayed in UI.

> ‣ **Idea Custom Field Mapping for Proposals** or **Proposal Custom Field Mapping for Projects**: Select the Idea or Proposal/Charter field that it maps to. When a proposal is accepted and a project is created, the proposal custom fields are copied into the project custom fields based on this mapping.

6) Click **Update**.

> **Notes:**
>
> ▪ *You can have one custom proposal/charter field map to multiple project custom fields.*
>
> ▪ *Submit a Service Request to My Oracle Support to change the following custom field attributes: Initiative, Field Type, Required, Default Value, Sort Order, and Configured.*

Configuring User Defined Custom Fields

To create user-defined custom fields:

1) Click the **Application Configuration** tab.
2) Click the **Custom Fields** link. The *Manage Custom Fields* page is displayed. The fields are organized by section e.g., Ideas, Proposal, Project, Program and Resource.
3) Click the link associated with the section you want to edit, for example Manage Custom Fields for Ideas. The Manage Custom Field for Ideas page is displayed.
4) Click the **Create a New User Defined Field** button.
5) Enter a field name.

> **Note:** If you plan to use the BI Publisher reporting schema to report through BIP, the first character of a custom field cannot contain a number or special characters, such as * or (.

6) Choose the type of field you are creating. You can select one of the following types: **Unassigned**, **Float** (a number with a decimal point), **Integer**, **List**, **Multi List**, **Text**, **Date**, **Currency**, **Boolean**, **Notes**, **Global Resource**, **Label**, **Calculated Expression**, or **Hyper Link**.

7) If you selected Calculated Expression as the Field Type, select the type of calculated expression you are configuring: **Currency**, **Integer**, or **Float**.

8) Configure the following optional field setting:

   ▸ **UI Section**: Select a section within which this custom field should display. For example, you can choose to display a project custom field under Basics, Classification, or Organization. This option is only available   if you are configuring custom fields for Ideas, Proposal, Projects, or Programs.

   ▸ **Initiative**: Select the initiative that this custom field belongs to.

   ▸ If you selected **Calculated Expression** as the Field Type, enter an expression:

     ▪ From the **Insert from Section** drop-down list, select the section you want this field to display.

     ▪ From the **Field** drop-down list, select the fields associated with the expression, and click **Add**. You can enter field names, select operators or symbols to create your custom expression.

     ▪ Click **Validate**, to ensure that the expression is valid.

   ▸ **Visible**: Select **Yes**, **No**, or **Context-Sensitive**. If you select context-sensitive, then enter the conditions when this custom field should be displayed. The Context Sensitive option displays only if you are configuring custom fields for Ideas, Charters, and Projects.

   ▸ **Display on List Page**: Select **Yes** if you want this field to appear on list pages.

   ▸ **Display in Filter**: Select **Yes** if you want this field to appear as an option in the Filters dialog box.

   ▸ **Required**: Select **Yes** if you require users to enter a value for this custom field.

   ▸ **Default Value**: Enter the default value for this custom field.

   ▸ **Minimum**: Enter the minimum value for this custom field.

   ▸ **Maximum**: Enter the maximum value for this custom field.

   ▸ **Valid Values**: Enter the valid values for this field. To enter multiple values in the Valid Values field, enter one value per line.

   ▸ **Sort Possible Values Alphabetically**: Select **Yes** if you want the possible values alphabetically sorted when displayed in the UI.

   ▸ **Update Status and Order of Possible Values**: For each value select **Valid**, **Invalid,** or **Archived**. Values that are marked **Valid** are displayed in the UI as valid field options; invalid field values are not displayed in the system and cannot be used. Archived field values are maintained in the system, but are not displayed as valid field options. You can also enter a sort order for each value. This order determines the order in which these values are displayed in UI.

▸ **Tool Tip**: Enter help text. The text you enter is displayed next to the custom field. Users can mouse over the **Information** icon to view the help text.

▸ **Idea Custom Field Mapping for Proposals** or **Proposal Custom Field Mapping for Projects**: Select an Idea or Proposal/Charter field that maps to this Project or Proposal. When a Proposal is accepted and a project is created, or when an Idea is accepted and a Proposal is created, the custom fields are copied to the Project or Proposal custom field based on this mapping.

> **Notes:**
>
> - *You can have one custom proposal/charter field map to multiple project custom fields.*
>
> - *When the Context Sensitive option is chosen, the default field value is used for all entities that already exist in the system.*
>
> - *For custom field values to be maintained when Ideas move to Charters, or when Charters move to Projects, the target custom field needs to be set to be visible. In addition, for field type List or Multi List, the target field (Proposal or Project) must also contain the values that are in the source (Idea or Proposal).*
>
> - *Submit a Service Request to My Oracle Support to change the following custom field attributes: Initiative, Field Type, Required, Default Value, Sort Order, and Configured.*
>
> - *The Calculated Expression field type is supported for Ideas, Proposals, Projects, Programs, and Activities.*

9) Enter a Sort ID. This ID tells the system where it should be located in the list of user defined fields. You can click the **Order of Existing Fields** link to view the existing list before entering a number in this field.

10) Click **Create.**

> **Important:** You cannot delete custom fields after they are created. You can hide the field by selecting **No** in the **Visible** field.

Configuring Pulldown values

You can use the **Pulldown Values** section of the **Administration** module to define various items that are displayed in pull down menus throughout the system. Within Enterprise Track there can be two types of pull-down values, Global and Initiative-specific. In systems that have a single initiative, the 'global' fields will not be distinguished from the initiative specific ones.

Global

In installations that support multiple initiatives within the same system global fields will remain the same across initiatives. To configure these values, refer to the topic *Configuring Global Pull Down Values* .

Initiative-Specific

These fields are initiative specific and can be different for different initiatives within the system.   To configure these values, refer to the topic *Configuring Initiative-Specific Pull-down Values* (on page 89).

In This Section

Configuring Global Pull Down Values

Within EnterpriseTrack there can be two types of pull-down values, Global and Initiative-specific. In systems that have a single initiative, the global fields will not be distinguished from the initiative specific ones.

Creating global pull down values

1) Click the **Application Configuration** tab.
2) In the **Global Pull down Values** section, click on the type of global pull down value you want to create.
3) You will see a list of the existing values for that category.
4) Click the **Create a New** button.
5) Enter a name for the value.
6) Enter an order ID.
7) Click **Create**.

Editing global pull down values

1) Click the **Application Configuration** tab.
2) In the **Global Pulldown Values** section, click on the type of global pull down value you want to edit.
3) You will see a list of the existing values for that category.
4) Click on the name of the value you want to edit.
5) In the *Edit Pulldown Value for Functional Area* page make the required changes.
6) Click **Update**.

Deleting global pull down values

Once created, the Global pull down values cannot be deleted through the user interface. Contact Oracle Customer Support for more information.

Configuring Initiative-Specific Pull-down Values

Within EnterpriseTrack there can be two types of pull-down values, global and initiative specific. In systems that have a single initiative, the global fields are not distinguished from the initiative specific ones.

Creating Initiative-Specific Pull-down Values

1) Click the **Application Configuration** tab.
2) In the **Pulldown Values** section, click on the type of pull-down value you want to create. Choose from **Note Type**, **Task Type**, **Tool Type, Document Type and Metric Type**.
3) Click the **Create a New** button.
4) Choose an initiative.
5) Enter a name for the value. This name will be displayed in the pull-down menus across the system.
6) For Metric Type values:
   a. Select if you want this metric to be the default primary metric.
   b. Enter a low value.
   c. Enter a high value.
7) If applicable, enter a sort ID for this value. The sort ID determines the order in which the values are displayed in the pull-down menu.
8) Click **Create**.

Editing initiative-specific pull-down values

1) Click the **Application Configuration** tab.
2) In the **Pulldown Values** section, click on the type of initiative pull-down value you want to edit. Choose from **Note type**, **Task Type**, **Tool Type, Metric Type** and **Document Type**.
3) You will see a list of existing values for each initiative in the system. For example, if you selected Task Type you will see a list of the task types that have already been defined in the system for each initiative.
4) Click on the name of the value you want to edit.
5) In the **Edit** page make the required changes.
6) For each value select **Valid**, **Invalid,** or **Archived**. Values that are marked **Valid** are displayed in the UI as valid options; invalid values are not displayed in the system and users will be forced to pick a valid value when the entity is edited. Archived values are maintained in the system, but are not displayed as valid options. Users can continue to use archived values until they change it.
7) Click **Update**.

Deleting initiative-specific pull-down values

Once created, initiative pull-down values cannot be deleted. They can only be marked as **Invalid** or **Archived**.

Configuring Classification Fields, Resource Pulldown Values and Alignment Pulldown Values

Creating Classification Fields, Resource, and Alignment Pull Down Values

1) Click the **Application Configuration** tab.
2) In the **Classification Fields**, **Resource Pulldown Values**, or **Alignment Pulldown Values** section, select the type of field you want to create.
3) You will see a list of the existing values for that category. For example, if you chose Functional Area, you will see a list of the functional areas that have already been defined in the system.
4) Click the **Create a New Functional Area** button.
5) Select the **Bulk Insert** checkbox to add multiple values at the same time.
6) Enter a name for the value.
7) Select the status (**Valid**, **Archived** or **Invalid**).
8) Click **Create**.

Deleting Classification Fields and Resource Pulldown Values

1) Click the **Application Configuration** tab.
2) In the **Classification Fields** or **Resource Pulldown Values** section, select the type of field you want to delete. You will see a list of values configured for that category.
3) Select a value.
4) Click **Delete**.

Deleting Alignment Pulldown Values

1) Click the **Application Configuration** tab.
2) Select **Alignment Type**.You will see a list of the existing types.
3) Click **[Delete]** next to the type you want to delete.

> **Note:** You can delete values only if they are not in use.

Finance Management

In This Section

Managing Currencies

EnterpriseTrack allows you to configure your system to work with multiple currencies. A list of required currencies should be specified during initial system configuration. You can then manage these currencies and make them available for use within projects through the user interface.

In This Section

Creating Currencies

When you create a new currency through the user-interface, you are, in fact adding a currency from the configuration file to the list of currencies available for use within projects.

To create a new currency:

1) Click the **Finance** tab.

2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.

3) Click the **Create a New Currency** button.

4) Select the appropriate currency from the **Currency** pull down menu. The page will refresh to pre-populate the other fields with all the available information about that particular currency.

5) Make the appropriate changes to the pre-populated information. You can change the names the conversion rate as well as the symbol. For some currencies, you may want to enter a multiplier. (For E.g., if we assume 1.00 USD = 5000 ZMK, if the US dollar is your base currency, you may want to enter 5 in the Conversion rate field and 1000 in the multiplier field. This way, users will only need to enter smaller numbers in the conversion rate field and are less likely to make mistakes while entering data)

6) Click **Create**.

Editing and Deleting Currencies

To edit an existing currency:

1) Click the **Finance** tab.

2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.

3) Click the **Edit** link next to the name of the currency you wish to edit.

4) On the **Edit Currency** page, make the required changes. The available fields may vary from currency to currency and determined by the fields defined within the configuration file.

5) Click **Update** to save your changes.

6) Click **Cancel** to leave the page without saving any changes.

Deleting a currency

To delete an existing currency:

1) Click the **Finance** tab.

2) Select the **Currencies** link. The *Manage Currency* page displays a list of all the existing currencies.

3) Click the **Delete** link next to the name of the currency you wish to edit.

4) Click **Ok** in the dialog box to continue with the deletion. Click **Cancel** if you want to retain the currency in your system.

> **Note:** When you delete a currency though the User-Interface, you are not deleting it from the configuration file. You can add this currency to the system by using the *Creating Currencies* (on page 91) link.

Managing Conversion Rates

To set monthly conversion rates for currencies that have been created in your system:

1) Click the **Finance** tab.

2) Click the **Conversion Rates** link.

3) Select the appropriate currency from the pull-down menu.

4) Select the year for which the conversion rates are being entered.

5) Click **Add Year** to add an additional year of conversion rate values. The default conversion rate values are used initially, but you can modify these values.

6) Enter the correct rates for each month. To copy the value for a particular month to all the subsequent months, you can click the copy forward button .

7) Click **Update**.

Managing Finance Templates

The Default Global Finance Template is installed when the system is first deployed. You can create new global or initiative-specific finance templates by copying and making changes to the default finance template. From the Finance Templates section, you can:

▶ View details of the finance template. The finance categories and subcategories are displayed. You can change the display name, enable or disable finance categories, change the multiplication type, and the multiplication factor value.

▶ Edit a finance template.

▶ Copy a finance template to create a new finance template.

▶ Add or update an Import/Export MS Excel template.

In This Section

Editing Finance Templates

To edit a finance template:

1) Select the **Finance** tab.

2) Click the **Finance Templates** link. All finance templates that are enabled are displayed. You can narrow the list by selecting an initiative check box and clicking **Go**.

3) Click the **Edit** link next to the template you want to edit.

4) Update the template.

5) Click **Update**.

The following settings are displayed on the Finance Template page:

Finance Template Name: Enter a name for this template.

Description: Enter a description for this template.

Finance Tracking Months: Enter the number of months for which financial data is to be tracked.

Default Finance Tracking Start Date: The date from which financial tracking should begin. E.g. the Project Start Date or the Planned Project Close Date.

Use Global Finance Lock Month: Select if you want to lock finances using the global finance lock month. To set the default global lock month, see topic *About Finance Locking*.

Finance Edit Mode: Select the default mode for tracking financial data. You can choose from **Monthly**, **Yearly** or **Aggregate**.

Important

If you choose to allow users to enter an aggregate value for the finances, you must specify the Finance Distribution Months (i.e., the entered lump sum value is to be distributed over X months). You can also set a Finance Distribution Repeat Frequency.

The system will allow you to switch from the Monthly mode to Yearly or Aggregate. You cannot switch from Yearly mode to Aggregate.

Additional Finance Timescale Display: Select **Yearly**, **Monthly**, or **Aggregate**. This setting controls the additional timescale options available in the Timescale field on the Detailed Finances tab. If the Finance Edit Mode is Monthly, you can select Yearly or Aggregate; if the Finance Edit Mode is set to Yearly or Aggregate, you can only select Monthly.

Data Entry Mode: You cannot make changes to this field if the template is in use. Select **Single View (Basic Only)** or **Double View (Plan and Actual)**. If you select Double View, two finance tables or views are displayed per project: one view for Plan and one for Actual. In Single View, only one finance table or view is displayed per project.

Default Forecast (Forecast) Cutoff Date: Select from **Finance Lock Month (from Actual)** or **Current Month**. This field sets the default cutoff date that is used as a separator between actual values and plan values.

Proposal Finances Enabled: Select **Yes** or **No**. If you select **Yes**, you can edit and view a detailed finance table at the proposal level.

Finance Distribution Months: This field is displayed only if the Finance Edit Mode is set to Aggregate. Enter the number of months the lump sum value is to be distributed over.

Resource Computation Enabled: Select if you want to enable resource computation. When you enable resource computation, the effort data flows from the activities into the Project Finance template. Select **No**, if you want to import finances from MS Excel.

Resource Computation Mechanism: Select if you want to convert currency values or non-currency values.

Locked Finance for Open/Closed Projects: The name of the column header for the field that displays the financial details for open/closed projects.

Unlocked Finances for Open Projects: The name of the column header for the field that displays the unlocked financial details for open projects.

Unlocked Finances for Closed Projects: The name of the column header for the field that displays the unlocked financial details for closed projects.

Net Present Value (NPV): Enter a display name and select if you want to enable this field. If enabled, these fields appear in the Finance Summary page for each project. This field measures the excess or shortfall of cash flows, in present value (PV) terms, once financing charges are met. By definition, NPV = Present value of net cash flows.

Formula for NPV: value * (1 + (monthly wacc/100)) ^ (-months))

Where wacc is the cost_of_capital months. The number of months between the fin track start date and the month_date for each of the rows returned by the query.

Example:

Fin edit mode: Monthly.

NPV Finance Category: Total = 150

Saving = 300

Cost = 150

Finance Tracking Months: 24

Finance Track Start Date: Jan/08/2007

Wacc (cost_of_capital): 7.5%

NPV = 1,583.98

NPV for the Finance Edit mode Aggregate is 0.

Internal rate of Return (IRR): Enter a display name and select if you want to enable this field. If enabled, these fields appear in the Finance Summary page for each project. This field represents the return rate which can be earned on the invested capital, i.e. the yield on the investment. It is defined as any discount rate that results in a net present value of zero of a series of cash flows.

Formula for IRR: value * (1 + (monthly wacc/100)) ^ (-months))

Examples:

Fin edit mode: Monthly.

NPV Finance Category: Total = 150

Saving = 300

Cost = 150

Finance Tracking Months: 24

Finance Track Start Date: Jan/08/2007

Wacc (cost_of_capital): 7.5%

IRR= 1,583.98

Fin edit mode: Yearly.

NPV Finance Category: Total = 150

Saving = 300

Cost = 150

Finance Tracking Months: 24

Finance Track Start Date: Jan/08/2007

Wacc (cost_of_capital): 7.5%

IRR=269.33

IRR for the Finance Edit mode Aggregate is 0.

Return on Investment (ROI): Enter a display name and select if you want to enable this field. If enabled, these fields appear in the Finance Summary page for each project. This field is the ratio of money gained or lost on an investment relative to the amount of money invested.

Formula for ROI:(Savings ROI - Cost ROI)/ Cost ROI)*100

Example:

ROI-1 Saving = 300

ROI-2 Cost = 150

Finance Tracking Months: 24

Finance Track Start Date: Jan/08/2007

Wacc (cost_of_capital): 7.5%

ROI=1

> **Note:** These settings are only defaults and can be changed at the project level.

Copying a Finance Template

To copy a finance template:

1) Click the **Finance** tab.
2) Click the **Finance Templates** link.
3) Click the **Copy** link next to the template you want to copy.
4) On the *Copy Finance Template* page enter a new name for the template in the **Copy To** field.
5) Select the initiative to associate with this template.
6) Click **Copy**.
7) To make changes to this template, see topic *Editing Finance Templates.*

Viewing and Editing Finance Categories within a Template

Viewing Finance Categories

To view the details of the finance template:

1) Click the **Finance** tab.
2) Select the **Finance Templates** link.

3) From the **Action** column, click the **View details** link. All the finance categories and subcategories are displayed.

Editing Finance Categories

To edit the finance categories

1) Locate the finance category you want to modify and click the **Edit** link.
2) The following fields can be edited:
   ▸ **Display Name**: The name that is displayed in the user interface.
   ▸ **Visible?**: Select whether this category should be available for use through the user interface.
   ▸ **Parent Category**: The parent category for this category.
   ▸ **Sort ID**: The sort order number. This number decides where this category is displayed under the parent category.
   ▸ **Multiplication Factor Type**: You can choose from Static or Expression.
   ▸ **Multiplication Factor Value**: The multiplication factor applied to the category value when data is rolled up to obtain the category totals.

   If you selected the multiplication factor type to be static, this value should be a number, typically between 0 and 1.0. If you selected the type to be an expression, the value should be an expression in terms of the configured finance constants for your system. E.g. cost_of_capital, 1- cost_of_capital.
   ▸ **Element Type**: The type of element. By default, this is set to Currency. You can also use this field to indicate non-currency items, for example: Employee Count or Computers.
3) Click **Update**.

Managing the MS Excel Import and Export Template

To edit the Excel import and export template:

1) Select the **Finance** tab.
2) Click the **Finance Templates** link. All finance templates that are enabled are displayed. You can narrow the list by selecting an initiative check box and clicking **Go**.
3) Click the **MS Excel** link next to the template you want to edit.
4) Select if you want to import finances from MS Excel.
5) Click **Browse** and select a template file to use.
6) For the field **Excel template file in sync?**, select **Yes** or **No**. This Excel template file is associated with the finance template within EnterpriseTrack. When you modify your finance template you should modify the associated Excel template file and upload it to this page.
7) Click **Update**.

> **Notes:**
> - If the finance template is set up to import from MS Excel, users cannot manually add or edit finance data.
> - If the Excel file is not in sync, users cannot import and export financial

information from their projects.

Managing Finance Approval Templates

In This Section

Working with Finance Approval Templates

Finance approval templates can be used to dictate the finance approval workflow for projects. Finance Approval Templates allow you to configure the approval workflow with greater flexibility.

There can be multiple financial approval workflows associated with an initiative. If there is only one approval workflow template for an initiative, all projects within that initiative will use that workflow by default. If more than one approval workflow template exists, users will see a Finance Approval Workflow Template pull-down menu when they create a project.

Creating a New Finance Approval Template

To create a new finance approval template:

1) Click the **Finance** tab.
2) Select the **Finance Approval Templates** link. You will see a list of the available approval templates.
3) Click the **Create New Finance Approval Template** button.
4) In systems with multiple initiatives, you must select the initiative with which the template is to be associated.
5) Enter a name and description for the template.
6) Set the **Sequential** flag to **Yes** to make the application enforce sequential approvals.
7) If the Enforcement Status is set to **Enforce required finance validations on project close** the application will not allow the project manager to close the project until all the required finance approvals are granted.

Viewing and Editing Finance Approval Definitions

Viewing Finance Approval Template definitions

To view the details of a finance approval template:

1) Click the **Finance** tab.

2) Select the **Finance Approval Templates** link. You will see a list of the available approval templates.

3) Click the **View details** link. From the Finance approval definitions page you can add new steps, edit or delete existing steps.

Editing Finance Approval Template Definitions

1) On the Finance approval definitions page click the **Edit** to edit details of a finance approval step. You can edit the name and description of the approval step.

2) The **Request Optional** setting controls how the Request and Approve buttons are displayed. If the request is set to optional, approvers can approve without having to wait for a request for approval. In this case both **Request** and **Approve** buttons are displayed in the project finance validation screen.

3) The **Approval Optional** setting controls how the Request and Approve buttons are displayed. If a particular approval step is required and the approval has to be done is a particular sequence then this approval needs to be granted before the **Request** and **Approves** button for subsequent steps are displayed.

4) Select the roles that can perform Request, Approve and Undo actions for the particular approval step. Multiple roles can be selected by holding the Control key while clicking the name of the role.

Managing Finance Element Types

Finance element types allow you to define various financial elements and assign a rate per unit for that element. For example, you could define an Element type called Man-Hours and assign it a rate of $20 per unit.

This ability to create finance element types allows you to use financial and non-financial inputs to calculate financial savings.

> **Note:** These setting are defaults and can be modified from the Financial Settings page for each project.

Managing Labor Expense Types

In This Section

Creating Labor Expense Types

You can create multiple Labor Expense Types (LETs) based on your business needs. The LETs you create are associated with a finance expense category (Capital Expense or Operational Expense). Project Managers can use these LETs to label project activities. For example, you can create an LET called *Training*, and associate it with the finance expense category *Operational Expense*. Project Managers can mark activities that relate to training expenses under the LET *Training*.

To create Labor Expense Types (LETs):

1) Click the **Finance** tab.
2) Click the **Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3) Click the **Create a New Expense Type** button. The *Create Labor Expense Type* screen is displayed.
4) Enter a name for the LET
5) Select an expense category from the drop-down list.
6) Click **Add** to add a new LET.

Editing Labor Expense Types

You can edit Labor Expense Types (LETs) by changing its status and its association with an expense category.

To edit Labor Expense Types (LETs):

1) Click the **Finance** tab.
2) Click the **Labor Expense Types** link. The *Labor Expense Type List* screen is displayed.
3) From the **Actions** menu, select the **Edit** link next to the LET you want to edit. The *Edit Labor Expense Type* screen is displayed.
4) You can change the LET and the expense category from the drop-down list.
5) Choose the status of the LET. You can select **Active**, **Invalid**, or **Archived**.
6) Click **Update** to save your changes.

> **Note:** *You cannot modify an LET that is currently in use. To deactivate an LET, you have to change the status to Invalid.*

Managing Activity Labor Cost Capitalization Settings

Enabling Activity Labor Cost Capitalization allows you to select a Labor Expense Type (LET) attribute for each activity. Activity labor costs are properly rolled up into finance under appropriate expense category (Capital Expense, or Operational Expense) based on its LET.

For each initiative, you can choose to enable or disable Activity Labor Cost Capitalization, and select if you require Project Managers to enter the LET for each activity. You can also set a default LET.

To manage the Activity Labor Cost Capitalization Settings:

1) Click the **Finance** tab.
2) Select the **Activity Labor Cost Capitalization Settings** link.
3) Click the **[Edit]** link next to the initiative you want to modify.
4) Select if you want to enable labor cost capitalization.
5) Select if you require Project Managers to enter the LET for each activity.
6) Select a default LET. Project Managers can override the default values only if *Labor Cost Capitalization* is enabled.
7) Click **Update** to save your changes.

Updating Global Finance Constants

The default financial settings are created when your system is first configured. Use the **Global Finance Constants** link to modify the finance constants that were configured for your system.

To update global finance constants:

1) Click the **Finance** tab.
2) Select the **Global Finance Constants** link.
3) Update the global finance settings.
4) Click **Update**.

About Finance Locking

You can lock finances to prevent changes to project-level finances for auditing, reporting or compliance purposes. These locks can be set at the global level, at the initiative level, or at the organization hierarchy level.   At the individual project level, users can override this lock if they have either the Project Finance Administrator or the Update Project Lock Month permissions.

Use the Bulk Finance Locking page to:

▸ Set the global finance lock month and finance view to lock.
▸ Set bulk finance locks for all projects and proposals associated with an initiative or organization hierarchy.
▸ View, edit, and delete the active finance locks.
▸ set temporary finance locks at the global, initiative, or organization hierarchy level.

Setting Global Finance Locks

When you set a finance lock, all finance data for all periods up to the lock month will be locked. The finances are displayed in read-only mode and users cannot make changes to any value within that period. In addition, you can also create a temporary lock for all finance months with immediate effect. To view, edit, or delete finance locks, see topic *Viewing, Editing, or Deleting Finance Locks*.

To create a global finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the Global Finance Locking section, select the finance view to lock. You can select to the **Actual**, **Plan**, **Basic** or **All**.
If your finance template is configured with the Data View Mode set to Single View Basic, you can only select Basic as the finance view to lock. You can use Actual, Plane or All if your finance template is configured with the Data View Mode set to Double View.

4) Select the **Set Global Finance Lock Month** check box.

5) Select the lock month and enter the year.

6) Click **Update**.

To create a temporary global finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the Global Finance Locking section, select the **Set Temporary Global Lock for All Finance Months Now** check box.

4) Click **Update**.

Setting Bulk Finance Locks

You can set a bulk finance lock for all projects associated with an initiative, organization hierarchy, or both. All finance data for all periods up to the lock month will be locked. The finances are displayed in read-only mode and users cannot make changes to any value within that period. In addition, you can also create a temporary lock for all finance months with immediate effect. To view, edit, or delete finance locks, see topic *Viewing, Editing, or Deleting Finance Locks*.

> **Note:** If you have multiple finance locks, then the smallest lock will have the highest priority. Organization hierarchy locks will have a higher priority than initiative locks, which in turn will have a higher priority than global locks. For example, if a project is affected by an organization hierarchy lock month and an initiative lock month, then only the organization hierarchy lock month will affect the project.

To create a bulk finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the Bulk Finance Locking section, select the finance view to lock. You can select to the **Actual**, **Plan**, **Basic** or **All**.

4) Select an initiative.

5) Select one of the following Org Hierarchy option: **Individual** or **Relational**. Select **Individual** if you want to specify the bulk lock for a specific level of the org hierarchy. Select **Relational** if you want to select more than one level.

   a. If you selected **Individual**, select an organization hierarchy level and value.

    b. If you selected **Relational**, select values for one or more levels.

6) Select the **Set Bulk Finance Lock Month** check box.

7) Select the lock month and enter the year.

8) Click **Update**.

To create a temporary bulk finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the Global Finance Locking section, select the **Set Temporary Global Lock for All Finance Months Now** check box.

4) Click **Update**.

Viewing, Editing, or Deleting Finance Locks

To view the active finance locks:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link. The active locks are displayed under the **Active Global and Bulk Finance Locks** section.

To edit a finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the **Active Global and Bulk Finance Locks** section, click the **Edit** link next to the lock you want to modify.

4) Modify the lock settings.

5) Click **Update**.

To delete a finance lock:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Locking** link.

3) From the **Active Global and Bulk Finance Locks** section, click the **Delete** link next to the lock you want to delete.

4) Click **Ok** to confirm the deletion.

5) Click **Update**.

Using Bulk Finance Snapshots

You can capture finance snapshots for all projects or for projects associated with a specific initiative or organization hierarchy. For projects that have that the Data Edit mode set to Double View, a snapshot of both plan and actual finances are taken.

To create bulk finance snapshots:

1) Click the **Finance** tab.

2) Select the **Bulk Finance Snapshots** link.

3) Select a snapshot type. You can select the **Global** or **Initiative**. If you select Initiative, select an initiative from the drop-down menu. If you select Org Hierarchy, select a hierarchy level.

4) Select one of the following Org Hierarchy option: **Individual** or **Relational**. Select **Individual** if you want to specify the bulk lock for a specific level of the org hierarchy. Select **Relational** if you want to select multiple levels of hierarchy.

   a. If you selected **Individual**, select an organization hierarchy level and value.

   b. If you selected **Relational**, select values for one or more levels.

5) Enter a name for this snapshot.

6) Enter a description for this snapshot.

7) Click **Create Snapshot**.

Managing Finance Lock Enforcement Settings

To configure the finance lock settings:

1) Click the **Finances** tab.

2) Select **Finance Lock Enforcement Settings** link.

3) Select an initiative and click the **[Edit]** link next to it.

4) Select **Strict** or **Limited**.

5) Click the **Update** button to save you changes.

> **Important!**
>
> Oracle recommends not changing the enforcement mode on a live production system. When the mode is changed, it takes effect only for new projects created from that point of time. Old projects continue in the previous enforcement mode and cannot be changed.
>
> **Notes:**
>
> - In the Limited mode, the finance lock/close period enforcement is guaranteed only when roadmap activities are used with Actual Effort Type (AET) set to Effort from Finances. Finance lock enforcement is not guaranteed when used with any other AET.
>
> - If finance lock is set to Strict, you cannot change the currency exchange rate or labor rates for locked/closed financial periods. For roadmap activities, the Actual Effort Type (AET) is restricted to Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances.

The following table lists the supported options for both the Strict and Limited modes.

Supported Options	Strict	Limited
Enforcement	Always Guaranteed	Not Guaranteed. Guaranteed only when used with AET set to Effort from Finances,

		finances are edited in the monthly mode, and resource rates are explicitly overridden at the project level. Enforcement is through manual process.
Resource labor rate, role, labor rate changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.
Currency conversion rate (exchange rate) changes	Not allowed if it can affect a finance lock/close period in any project.	System does not check for violation and finance lock/close period integrity is not protected.
Supported AETs	Effort at Resource Level (Detail), Effort from Timesheet, and Effort from Finances	All AET options
Unsupported AETs	Duration& Resource % availability, Effort at Activity Level- Equal % Distribution, Effort at Activity Level- Unequal % Distribution, and Effort at Resource Level (Summary)	None
Editing finances in yearly or aggregate (annualized) mode	Not allowed	Allowed. Finance lock may not be protected.

General Settings

In This Section

Company Settings

In This Section

Viewing Account Properties

Use the *Account Properties* link to view the account name, SiteWand version, account character encoding type, account authentication type, and account time zone.

To view your account properties:

1) Click the **General Settings** tab.
2) Select the **Account Properties** link.

Managing Company Information

You can use the *Company Information* page to add your company name, company URL, product name and footer.

To edit your company information:

1) Select the **General Settings** tab.
2) Click the **Company Information** link. The *Edit Company Information* screen is displayed.
3) Enter the appropriate values.
4) Click **Update**.

Managing Company Logo

Use the *Company Logos* page to upload your company logo. You can add a logo to the EnterpriseTrack header and the login page.

To upload you company logo:

1) Select the **General Settings** tab.
2) Click the **Company Logos** link. The *Edit Company logo* page is displayed.
3) Click **Browse** to find the image. The preferred image formats are JPEG, GIF, PNG and BMP. The logo size on the login page is 278 x 80 pixels and the header logo size is 232 x 18 pixels.
4) Click **Update**.

Managing Default Date Format

Use the *Default Date Format* page to select a default date format to use in EnterpriseTrack.

To select a default date format:

1) Click the **General Settings** tab.
2) Select the **Default Date Format** link. The *Edit Default Date Format screen* is displayed.
3) Select a format from the drop-down list.
4) Click **Update**

Managing Default Time Format

Use the *Default Time Format* page to select a default time format to use in EnterpriseTrack.

To select a default time format:

1) Click the **General Settings** tab.
2) Select the **Default Time Format** link. The *Edit Default Time Format screen* is displayed.
3) Select a format from the drop-down list.
4) Click **Update**

Internationalism

In This Section

Working with the Language Catalog

You can use the Language Catalog page to edit the language catalog. If you have customized EnterpriseTrack with custom terms or configuration data, you can add or edit the translations using the Language Catalog page.   If you have a large number of custom strings that require translation, you can export the language catalog as an XLIFF file, translate the strings and import it into EnterpriseTrack.

> **Notes:**
> - Oracle recommends that you save a copy of your language catalog in each language before you modify the catalog or before you import a new language catalog.
> - You must first click the **Scan Language Catalog** button to ensure that the catalog has all static strings that contain the customized terms before you begin modifying the language catalog.

Using the Language Catalog Filter

To use the language catalog filter:

1) Select the **General Settings** tab.
2) Click the **Language Catalog** link. The *Language Catalog Filter* page is displayed.
3) Click the **Scan Language Catalog** button.
4) When the scan is complete, select the filtering criteria from the *Language Catalog Filter* page. Since the catalog can contain thousands of terms, it is recommended that you set some high level filtering options (e.g. by language, or category) for ease of use.
5) Choose the number of results you want displayed on each page.
6) Choose the status (Translated or Not yet Translated).
7) Click **Apply**. The *Language Catalog* page displays a list of terms that meet your criteria.

> **Tip:** When the list is displayed, you can view the details of the current filter by clicking the **Show Current Filters** icon. You can also filter by selecting a language from the displayed options.

Editing the Language Catalog

To edit the language catalog:

1) From the *Language Catalog* page, click the **Edit** link next to the term you wish to edit. The *Edit Language Catalog* page is displayed. You may have to navigate through multiple pages using the **<< < > >>** keys to locate the correct page.
2) Make the appropriate changes.
3) Click the **Update** button to save your changes.

Exporting and Importing the Language Catalog

1) From the *Language Catalog* page, click the **Export** button and click **OK** to save the XLIFF file.

2) From the *Language Catalog Filter* page, click the **Browse** button and select the translated XLIFF file, and click **Import**.

> **Notes:**
>
> - PDF reports in Russian, Korean, Japanese, and Chinese are displayed correctly only if they are run by users in corresponding locales.
> - No user data is translated. For example, project names and descriptions are not automatically translated; they are displayed in the language of the user that created them.
> - Administration and configuration can only be done in English.

Help Settings

In This Section

Managing Evaluation and Fields Help

You can choose to leave the initial configuration setup help as is or you can attach a help document (Word, Excel, HTML, PDF etc.), or point users to an URL address.

To select the type of help you will provide for configuration setup:

1) Click the **General Settings** tab.
2) Select the **Evaluation and Fields Help** link.
3) Select an entity and click the **Edit** link next to it. The *Edit Help Type* screen is displayed.
4) Choose the type of help you will provide:
   - Select **Initial Deployment Setup** to use the initial configuration help. These are the descriptions that were entered during the initial deployment.
   - Select **Document** and click the **Browse** button to select and upload a document; or select **URL** and type the address.
5) Click **Update**.

Managing User Productivity Kit

To manage the User Productivity Kit:

1) Click the **General Settings** tab.
2) Select the **User Productivity Kit** link. The *Administration: Manage User Productivity Kit* page is displayed.

To change the base URL:

1) Click the **Edit** link next to **User Productivity Kit Content Base URL**.

2) Select the location of the UPK content: **External** or **Local**. Select **External**, if you want to host it from your own server. Select **Local**, if you want the UPK content to be hosted from the same location that the EnterpriseTrack application is hosted.

3) If you selected **External**, enter the Base URL of the server hosting the UPK content.

4) If you selected **Local**:

    a. Click **Browse**, and select the published UPK file.

    b. Select if you want only authenticated users to access the UPK content.

    c. Click **Upload**.

    d. Click **Done**.

5) Click **Update**.

To change the application identifier:

1) Click the **Edit** link next to **User Productivity Kit Application Identifier**.

2) Update the identifier and click **Update**.

Specifying Online Help URL

Use the *Online Help URL* page to specify a new URL location to launch the Online Help when help is selected from the application.   If you choose to deploy a local version of the help you can enter the URL in the following format: *http://<hostname>:port/help/*. You can also leave the default URL to launch the version of the help hosted by Oracle. Using the hosted version ensures that you always have the most current help content.

To change the default Online Help URL:

1) Click the **General Settings** tab.

2) Select the **Online Help URL** link.

3) Specify a new URL location to launch Online Help.

4) Click **Validate**.

5) Click **Update**.

Notifications/Emails

In This Section

Configuring Notifications

EnterpriseTrack can be configured to send informational and warning notifications to its users. As an administrator, you can manage who these notifications are sent to, the reason for the notification, and if any action needs to be taken by the recipient. These settings can be overwritten at the project level by users with appropriate permissions.

To manage notifications:

1) Click the **General Settings** tab.
2) Click the **Notification Configuration** link. You will see a list of notifications that have been configured in your system.
3) Click the **[Edit]** link next to the notification you want to modify.
4) From the **Edit Notification** page, modify the following fields:
   a. **Enable Social Stream:** Select this check box if you want the notification to be posted to the social stream.
   b. **Enable Email Notification:** Select this check box if you want the notification to be sent via email.
   c. **Display Login link:** Select this check box if you want to display a login link in the email notification. This option is displayed only for some notifications.
   d. **Display Contact Me link:** Select this check box if you want to display a contact me link in the email notification. This option is displayed only for some notifications.
   e. **Email To**, **Email CC**, and **Email BCC:** Click in the appropriate field and select the roles from the **Email List** menu on the right. You can select multiple entries by holding down the **Ctrl** key on your keyboard. You can also select the roles one at a time and separate the values with a comma.
   f. **Email Subject:** Modify the default text.
   g. **Email Body Text:** Modify the default message associated with this notification
5) Click **Preview** to view the email notification that will be sent out.
6) Click **Update**.

> **Note:** Some notifications are visible only if the associated feature is enabled. You cannot add custom notifications.

Setting Measure Data due Reminder Notification

Use the *Measure Data Due Reminder Notification* page to set when notification needs to be sent out to remind users that measure data is due.

1) To set the data due reminder notification:
2) Click the **General Settings** tab.
3) Select the **Measure Data due Reminder Notification** link.
4) Click the **[Edit]** link next to the frequency you want to change.
5) Enter the number of days.
6) Click the **Update** button to save your changes.

Managing Default Email Addresses

You can use the *Default Email Addresses* link to configure default Email addresses. You can set a *From* address for emails sent by the system, and a *Do not reply* address.

To add general Email default addresses:

1) Click the **General Settings** tab.
2) Click the **Default Email Addresses** link.
3) Enter the default addresses.
4) Click **Update**.

Setting Stream Ticker Refresh Interval

To set the refresh interval of the Stream Ticker:

1) Click the **General Settings** tab.
2) Select the **Stream Ticker Refresh Interval** link.
3) Click the **[Edit]** link.
4) Enter the *Refresh Interval* in minutes.
5) Click the **Update** button to save your changes.

Report, Listing Page, and Search Settings

In This Section

Managing Max Rows for Reports

Use the *Max Rows For Reports* page to limit the number of rows to display in reports.

To edit the settings:

1) Click the **General Settings** tab.
2) Select the **Max Rows for Reports** link. The *Edit Max Rows for Reports screen* is displayed.
3) Enter the value.
4) Click **Update**

Managing Max Rows for My Work

Use the *Max Rows For My Work* page to limit the number of rows to display on the My Work page.

To edit the settings:

1) Click the **General Settings** tab.
2) Select the **Max Rows for My Work** link. The *Edit Max Rows for My Work screen* is displayed.
3) Enter the value.
4) Click **Update**

Restricting Document Sizes

To restrict document sizes by initiative:

1) Click the **General Settings** tab.
2) Select the **Document Size Restriction** link. You will see a list of the current document sizes allowed for each initiative.
3) Click the **[Edit]** link next to your initiative.
4) Enter a new value. The sizes are in kilobytes. You can leave the field blank if you do not want to restrict the size of the documents.
5) Click **Update** to save your changes.

Configuring Report Attachment Max Size

To restrict attachment size:

1) Click the **General Settings** tab.
2) Select the **Report Attachment Max Size** link.
3) Click the **[Edit]** link next to your initiative.
4) Enter a new value. The sizes are in kilobytes.
5) Click **Update** to save your changes.

Selecting Display Mode for Filter Page Sections

You can set how you want the filter pages to display. You can choose to have the filter section all expanded, or all collapsed, or Keep the filter section as is. If you choose *Keep The Filter Sections As Is*, then some of the filter sections are expanded and some collapsed based on your earlier settings. All users in the system will see this change.

To modify the display mode for filter pages:

1) Click the **General Settings** tab.
2) Select the **Display Mode for Filter Page Sections** link.
3) Click the **[Edit]** link.

4) From the pull-down menu select from **Keep The Filter Sections As Is**, **Collapsed All**, or **Expanded All**.

5) Click the **Update** button to save your changes.

Setting Max Cache Size for Listing Pages

The cache size refers to the number of rows, or entities (projects, proposal, or resources) displayed in listing pages.

To select the maximum cache size for listing pages:

1) Click the **General Settings** tab.

2) Select the **Max Cache Size for Listing Pages** link. The *Administration: Max cache size for listing pages* screen is displayed.

3) Click the **Edit** link. The *Edit max cache size for listing pages* screen is displayed.

4) Enter the cache size. The recommended default value is 1000 rows and the maximum is 3000 rows.

5) Click **Update**.

Managing Static Application Settings

Use the *Static Application Settings* page to modify the following settings:

▶ **Maximum number of rows to show in filter box**

Enter the maximum number of rows to show in the filter box throughout the application.

▶ **Maximum number of projects to show in filter box**

Enter the maximum number of projects to show in the Available Projects filter box.

▶ **Default number of rows per page**

Enter the default number of rows to display per page on listing pages.

▶ **Limit maximum number of rows per page to**

Enter the maximum number of rows to display per page on listing pages.

▶ **Default working hours per day**

Enter the default working hours per day.

▶ **Display string for TBD user**

Enter a display name for TBD user roles yet to be defined.

▶ **Maximum social stream events to display**

Enter the maximum number of social stream events to display on the social stream ticker.

▶ **Maximum social stream events to display per page**

Enter the maximum number of social stream events to display per page on the Social Stream listing page.

▶ **Maximum number of characters in social stream comment**

Enter the maximum number of characters allowed in the social stream comment box.

▶ **Maximum number of social stream comments to display**

Enter the maximum number of social stream comments to display. To view all the comments, users can click the View all comments link.

▸ **Maximum number of time units for scenario**

Enter the maximum number of time units to use for scenarios.

To set the static application settings:

1) Click the **General Settings** tab.
2) Click the **Static Application Settings (Max / Min Rows etc)** link.
3) Enter the values.
4) Click **Update**.

Configuring Integration Settings

Use the *Max Records to Retrieve in Integration Searches* link to select the maximum number of records to retrieve when an external application makes API calls.

To set the maximum number of records to retrieve:

1) Click the **General Settings** tab.
2) Select the **Max Records to Retrieve in Integration Searches** link.
3) Enter the maximum number of records to retrieve.
4) Click **Update**.

Storyboard Reports

In This Section

Managing Storyboard Templates

Use the *Manage Storyboard Templates* page to download, add, edit or delete storyboard templates. You can download the default template files and customize it by adding your company logo, changing fonts, or changing the background color.   A storyboard template contains a set of style rules that users can apply to their report to format and customize their PowerPoint presentations.

Adding Templates

To upload your updated or new storyboard templates:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Enter a display name for this template.
4) Click **Browse** to find your template.

5) Click **Add**.

Downloading Templates

To download and customize an existing storyboard template:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Click on the **Template File** to download it onto your computer.

Uploading an Edited Templates

You can change the template display name, replace the associated template file, or enable/disable the template. The templates you enable here are available as template options when users create project storyboard reports. The templates are edited in Microsoft PowerPoint.

> **Note:** You cannot edit or disable the default template file.

To upload an edited template:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Select the template by clicking on its Template Display Name.
4) Update the Template Display Name, or click **Browse** to select and upload a new template file, or select the **Enable/Disable** flag to enable or disable the use of this template.
5) Click **Update**.

Deleting Templates

To delete a template:

1) Select the **General Settings** tab.
2) Click the **Storyboard Templates** link.
3) Click the **Delete** link associated with the template you want to delete.
4) Click **Ok** to confirm the deletion.

Adding Storyboard Document Labels

To customize your storyboard document labels:

1) Select the **General Settings** tab.
2) Click the **Storyboard Document Labels** link.
3) Edit the description for each of the labels you want displayed on your storyboard.
4) Click **Update**.

Mobile Error Logs

To view and download mobile error logs:

1) Click the **General Settings** tab.

2) Select the **Mobile Errors** link.

3) Click **Download**.

Portal

In This Section

Configuring the Welcome Page

Use the **Welcome Page** link to customize the **Idea Portal Welcome** page. You can add a logo, modify the banner, and message.

To modify the Welcome page:

1) Click the **General Settings** tab.
2) Click the **Welcome Page** link.
3) Click **Browse** and select a custom logo.
4) Modifying the default banner, message, thank you banner and thank you message.
5) Click **Update**.

Scheduled Reports

Use the **Scheduled Reports** link to view all reports that are scheduled to run. From this page, you can enable or disable any of the scheduled reports and set the order of report execution.

To enable or disable scheduled reports or change the order of execution:

1) Click the **General Settings** tab.
2) Click **Scheduled Reports**.
3) Enter an order number to set the order in which reports are run.
4) Select the **Enabled** check box to enable or deselect to disable a scheduled report.

Data Import and Export

You can use the Data Import and Export function to initially populate your account with relevant information, import information from your legacy project management tool, and to perform recurring updates.

The high-level steps to import data are:

1) Download template from EnterpriseTrack for the object you want to import.
2) Format and enter data into the template.
3) Upload the template.
4) Validate the data.

5) Import the data.

In This Section

Downloading Data Import Templates

Importing data into EnterpriseTrack is a multi-step process.   EnterpriseTrack comes with pre-defined . csv templates which you must use to format the data to be imported. The system will validate the data before it is imported into the system, and check for duplicate records.

To download the templates:

1) Click the **Data Import & Export** tab.

2) Select the **Download Data Import Templates** link.

3) Depending on the primary object (Ideas, Project or User) for which you want to import data, click on the appropriate **[Download]** link.

4) When the file download dialog box opens up, choose the **Save File** option and save the file to your desktop.

5) Enter the data to be uploaded in the . csv file. The fields marked with an asterisk (*) are required fields and must be entered.

Once you have completed the template, you are ready to import data into EnterpriseTrack.

> **Note**: The .csv files needs to be encoded as UTF8, only if the data in file is not in ASCII format. UTF8 file formats are generally not compatible with MS Excel.

Modifying Metadata for File Upload

To modify the metadata details:

1) Click the **Data Import & Export** tab.

2) Select the **Modify Metadata for File Upload** link.

3) Choose the type of encoding, delimiter and decimal symbol.

4) Select if you want to trim trailing and leading spaces.

5) Enter the path delimiter and click the **Update** button to modify the metadata.

Importing Data

Importing data into EnterpriseTrack is a multi-step process. EnterpriseTrack comes with pre-defined MS Excel templates which you must use to format the data to be imported. You must download the template and enter the data into the template before it can be imported into EnterpriseTrack. Once you have completed the templates, you can upload it to the system, validate the data and then import it into EnterpriseTrack.

> **Notes:**
> - When updating entities, a null value will override an existing value.
> - Values added to calculated custom fields are ignored on import.

To begin importing data:

1) Click the **Data Import & Export** tab.
2) Select the **Import Data** link.
3) Depending on the primary object for which you are importing data, select from Import Ideas, Import Project or Import Users.

> **Note:** If you are importing projects, there are different templates for the different sub-sections of the project. You can upload data for each section independent of each other.

4) On the **Import (Object)** page, click the **[Upload Files]** link.
5) Click **Browse** and select the completed . csv file.
6) Enter additional attributes associated with the file you are uploading. If you are importing finances, select the Finance View (Plan or Actual) to upload.
7) Click the **Upload**. The system will tell you how many records were successfully uploaded.
8) Once the file has been uploaded, click the **Validate Data** button. On the Validate Data page, you can specify whether you want to allow changes to be made to the existing data or not. Click the **Validate Data** button. The system will work though the records and display a count of the records that have errors. All errors have to be fixed before the data can be imported.
9) Click the **Delete Files** button to delete an existing file and import a new one. Once data has been validated, you will have to delete the file before uploading a new one (even if you are only fixing errors).
10) Click the **Import Data** button to import the data. On the *Import Data* page, you can specify whether you want to allow changes to be made to the existing data or not. Click the **Import Data** button.
11) The imported objects should be visible in the appropriate listing pages.

Notes:

- You cannot import finances for projects using a finance template that have the setting **Resource Computation Enabled** set to **Yes**.
- When uploading incremental finances, you must set the field **Allow Updates to Existing Data** to **Yes** for the values to get updated.

Viewing Error Records

1) Click the **[View Error Records]** link to view a list of the records with errors.

2) A dialog box will ask you if you want to open a file. This file will give you the name of the record as well as the column that has the erroneous data. E.g. If the contact information has not been formatted properly for a particular idea, the Error Message will say *Contact*.

Common Validation Errors

The following table lists some common validation errors that may occur when importing or exporting entities.

Validation Error	Description
Role Import - Role is not part of the initial project team	The roles you want to import must be part of the initial project team for team members to be imported into the role on the project.
	The template to import team members is et_dataimport_csvtemplate_project_team and it requires a minimum of 3 columns: project_key[*], role_desc[*Role Description], login_id[*Login Id]
Project Import – Duplicate Project Names or IDs are not allowed	There is already a project in the system with this name, and the setting **Allow updates to existing data** is turned off for this project.
	The Project Key should be unique across all projects.
Project Import – Calendar Column is missing	Calendar is a required field for project import. Add this field before importing.
Project Import – Mandatory Data is missing	Finance Approval Template and Project Validate Date are required fields. Specify a valid financial approval template and a project validate date for this project.

Unlocking a Data Import Process

Use the *Unlock Data Import Process* page to unlock an import process that is locked. An import process can get locked if you navigated to another screen, closed the window, the session timed out, or the connection failed during an import.

> **Notes**:
>
> ▪ The *Unlock Import Data Process* link is visible only when a data import process is locked.
>
> ▪ Only the administrator that initiated the import process can unlock it. *Submit a Service Request to My Oracle Support if you need assistance.*

To unlock a data import process:

1) Click the **Data Import & Export** tab.
2) Select the **Unlock Import Data Process** link.
3) Click **Yes** to unlock the process.

Exporting Data

To export data:

1) Click the **Data Import & Export** tab.
2) Click the **Export Data** link.
3) From the **Action** column associated with the primary object (Idea, Project, Resource, etc.) you want to export, select the **[Export Data]** link.
4) From the **Last Modified Date** picker, specify a date. All objects that were updated on or after the specified date will be exported. If no date is specified, all data is returned. When exporting Measure, the Last Updated Measure Data is used.
5) For Monthly Finance and Annual Finance, enter the project IDs or a range of project IDs and click **Export**. If no project IDs are specified, a maximum of 100 projects are exported.
6) Select if you want to open or save the file. Choose the location and click **OK**.

Downloading Data Integration Templates

You to download two types of templates in real-time for a project, finance, resource, team member, WBS, non_WBS, and assignment entities, based on your EnterpriseTrack account configuration. They are:

▶ Templates for the CRUD functions.
▶ Templates for request data for the CRUD functions.

To download the CRUD templates:

1) Click the **Data Import & Export** tab.
2) Select the **Download Data Integration Templates** link.
3) Select values for the following fields from the corresponding drop-down list:

- ▸ **Languages**: Select your language. English is displayed by default.
- ▸ **Data Format**: Select the data format in which the function is to be rendered. Choices include: JSON, and XML.
- ▸ **Type**: Select the type of template that is to be downloaded. Choices include:
    - ▪ **Download Template**: Generates CRUD templates in XML and JSON formats.
    - ▪ **Download Request for Template**: Generates a request template in XML and JSON formats for each CRUD function. These request templates can be used to specify input data in the relevant CRUD function.
- ▸ **Initiative**: Select the initiative, if you are downloading a template for project, team member, activity WBS or activity non WBS entities.
- ▸ **Finance Template**: Select the finance template, if you are downloading a template for Project Finance Data or Project Finance Snapshot Data entities.
- ▸ **Activity Type Name**: Select the activity type, if you are downloading a template for Activity WBS or Activity Non WBS entities.

4) Click the **Download** button for the corresponding function.

If you chose **Download Template**, a create_request, update_request, search_request and delete_request file will be generated.

If you chose **Download Request for Template**, the following files will be generated: create_request_template, update_request_template, search_request_template and delete_request_template. You can use these files to specify input data for the relevant CRUD function.

Populate Resource Commitment Cache

Use the *Populate Resource Commitment Cache* link to clear and repopulate the resource allocation commitment cache. To use this, you must have the following settings enabled: Enable Allocation Units for Resources and Enable Effort Caching For Resource.

To populate the resource commitment cache:

1) Click the **Data Import & Export** tab.
2) Click the **Populate Resource Commitment Cache** link.
3) Click **Start Processing**.

Background Jobs

In This Section

Viewing Rate Change Status

The *Rate Change Submission Status* page displays the status of all rate change requests in the last 7 days.

To view the submission status of all rate change requests in the last 7 days:

1) Click the **Background Jobs** tab.
2) Select the **View Rate Change Submission Status** link.

Using Activity Labor Cost Capitalization

The Activity Labor Cost Capitalization feature allows you to add Labor Expense Type (LET) attributes to project activities. These LETs are mapped to finance expense categories like (Capital Expense or Operational Expense). Activity labor cost is properly rolled up into finance under appropriate expense category based on its LET.

> **Important!**
>
> Follow the configuration steps carefully to ensure proper labor cost roll-up from activities to finance. Please contact Oracle Customer Support if you have any questions.
> Set up the Finance Template to include all the sub-categories like standard effort, overtime effort, timesheet effort and timesheet overtime effort even if you are not currently using these categories. Labor cost data may not roll-up properly if the template is not set up as per the recommendations.

To setup and configure Activity Labor Cost Capitalization:

1) Modify the Finance Template.
   1. Ensure that the Finance Template has a separate category for **Capital Expense** and **Operational Expense**.
   2. The **Capital** parent category should include a sub-category **Resource Capital Expense** of type *Capital Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
   3. The **Expense** parent category should include a **Resource Operation Expense** sub-category of type *Operational Expense-Resource Activity based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
   4. The **Expense** parent category should include a **Resource Neutral Expense** sub-category of type *Resource based Finance Category*. It should include all standard effort, overtime effort, timesheet effort and timesheet overtime effort.
   5. Set the field *Resource Computation Enabled* to **Yes**.
2) Create Labor Expense Types (LETs) based on your company's business needs. See topic **Creating Labor Expense Types** (on page 100).
3) Set a default LET in the activity template. For more information, see topic **Creating Activity Templates** (on page 59).

4) Manage the Activity Labor Cost Capitalization Settings. For more information, see topic ***Managing Activity Labor Cost Capitalization Settings*** (on page 100).

   1. Select **Yes** for the field *Labor Cost Capitalization Enabled*.

   2. Select **Yes** for the field *Is Labor Expense Type required for Activities*. Oracle recommends that you mark **Yes** for this field if you have enabled Labor Cost Capitalization.

5) Enable Project Level Efforts.

6) Edit project finance settings. Ensure that the Project Manager has enabled these settings.

   1. The *Finance Tracking Start Date* should be the same date as the project start date. The actuals will not flow if they are not the same.

   2. Select **Yes** for *Resource Computation Enabled*.

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